

**Gendered Systemic Analysis:
Systems Thinking and Gender Equality
in International Development**

being a Thesis submitted for the Degree of
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by

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Dedications

For my beloved mother, Jane Clark Lewis (1927-2012) for showing me how to be resilient, altruistic, brave, loving and to always question “why”?

For my adored niece, Courtney Lewis, who embodies the collective wisdom and soulfulness of the women in her life, past and present.

For my dearest and closest women friends, Beth Neumeyer and Margaret Korosec, who have been by my side on this remarkable journey and will be forever more.

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For Nancy Morgan Fox, an advocate for women and girls, an intrepid feminist and a patient mentor. Her wisdom, kindness, feminism and sense of humour held me dear.

Inspirations

“I do not wish them [women] to have power over men; but over themselves”
(Wollstonecraft, 1792:67).

~

“If we can successfully generate and disseminate systems science and systemic intervention practices that are ethically reflective, take account of multiple viewpoints, and are sensitive to the ecology we are a part of, this will be one of the most beautiful gifts we could leave for future generations...No one person can do it alone, but by pooling our talents and insights we have a realistic chance of making it happen” (Midgley, 2003:xlix).

~

“Adopting a feminist systems perspective may help practitioners look for places where unintended consequences of an intervention might unfold”
(Stephens, 2013a:8).

~

“[We] must no longer accept concepts as a gift, nor merely purify them and polish them, but first make and create them, present them and make them convincing. What is needed above all is an absolute scepticism toward all inherited concepts”(Nietzsche, 1968:412).

~

“If we have learned anything in these years of late twentieth-century feminism, it’s that “always” blots out what we really need to know: when, where, and under what conditions has the statement been true” (Rich, 1984:214)?

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List of Abbreviations

CSH	Critical Systems Heuristics
CST	Critical Systems Thinking
FSP	Feminist Standpoint Theory
GAD	Gender and Development
LGBT	Lesbian, gay, bisexual, and transgender
MDG	(United Nations) Millennium Development Goal
NGO	Non-Governmental Organisation
SoSM	System of Systems Methodologies
UN	United Nations
UNA	<i>Universidad Nacional Agraria</i> (National Agrarian University)
UNDP	United Nations Development Programme
USA	United States of America
WAD	Women and Development
WID	Women in Development

Definitions

While a variety of definitions have been used for the terms below, this paper will use:

Action for Improvement: In Midgley's (2000:130) work he recommends allowing for local contexts to determine what constitutes taking 'action' which will be shaped by different ideas, constraints, theories and methods. The idea of 'improvement' as well as being locally defined, Midgley notes, is temporary. The temporary nature emphasises the concept of "sustainable improvement" so as to provide "long-term stability" for future generations. Within my research, Midgley's 'action for improvement' is offered by way of participatory practices that support stakeholders to identify their priorities, needs and interests through capacity development that is designed to build empowerment and agency.

Emancipation: The etymology of emancipate means, "set free from control" and from Roman times, "the freeing of a son or wife from the legal authority of the *pater familias* (oldest living male in a household)" (Online etymology dictionary, 2016). Within the first generation authors of Critical Systems Thinking, the concept of human emancipation "...seeks to achieve for all individuals the maximum development of their potential. In organisations according to Jackson (1991b:185-186) this freedom is to be achieved by "raising the quality of work and life in the organisations and society in which they participate". Midgley (2000) suggested this definition was too narrow a focus, and 'improvement' was a better term. As noted later in this thesis, I have elected to not use the term emancipate because of its patriarchal implications. I believe like Vargas (2005) that: "words are not neutral, nor do they have the same meaning when enunciated from other experiences"(14).

Empowerment: The core of empowerment lays in the ability of individuals to their own agency to influence their destiny contesting both structural and social inequalities (Sen, 1999; Grown et al., 2005). Using a feminist orientation: "women claiming and enjoying their rights, being able to make decisions about the direction of their lives, or beginning to access power denied to them"(Bishop & Bowman, 2014:254).

Gender: A normative definition of gender refers to the attitudes, feelings, and behaviours that a given culture associates with a person's biological sex and occurs across a continuum of possibilities (United Nations Evaluation Group, 2014). Because gender is socially constructed, it is part of the broader cultural context (Gender Spectrum, 2016). In Western culture gender has primarily been a binary concept; you are either female or male. However, my definition of gender is non-normative and I believe an essential recognition for the realization of human rights. My belief is that gender is a continuum and that a

“far richer tapestry of biology, gender expression, and gender identity intersects in a multidimensional array of possibilities...the gender spectrum represents a more nuanced, and ultimately truly authentic model of human gender” (Gender Spectrum, 2016). This expansive definition of gender is the foundation for the other terms defined below.

Gender analysis: “A systematic approach to examining factors related to gender by identifying and understanding the different roles, relationships, situations, resources, benefits, constraints, needs, and interests of diverse...” gender identities (Brisolara, 2014:344).

Gender equity: Is the practice of being fair to women and men and other gender identities. This fairness approaches and measures recognize the historical disadvantages that have barred or deterred women and other marginalised gender identities from having equal access and inclusion in opportunities. “Equity leads to equality” (United Nations Population Fund, 2005).

Gender equality: Gender equality is defined as equal status, opportunities, outcomes and rights for all people. It does not mean that everyone has to become the same, but that their rights, responsibilities and opportunities will not depend on their gender identity; that all human beings are free to develop their personal abilities and make choices without the limitations set by stereotypes, rigid gender roles, or prejudices (Organisation for Economic Co-operation and Development, 2009).

Gender mainstreaming: A widespread global change strategy designed to tackle inequality by embedding gender into every policy, programme, budget and evaluation. It was adopted by many governments and non-governmental agencies after its launch during the Beijing (China) Platform for Action and later codified during the Fourth United Nations World Conference in 1995 (United Nations, 1997). Twenty years later, although still a primary intervention strategy on the global platform, “critiques and reviews are almost universally negative” (Milward et al., 2015:75) with many attributing the slow progress to an “implementation gap” (Cornwall & Edwards, 2015:7). UN Women, the global agency accountable for gender equality and the empowerment of women notes, “progress towards substantive equality for women requires public action on three interrelated fronts: redressing socioeconomic disadvantage; addressing stereotyping stigma and violence; and strengthening agency; voice and participation” (UN Women, 2015:24).

Gender policy evaporation: A euphemism for policies and articulated commitments that sometimes dissipate or are weakened from their original

equitable focus during the design, implementation or evaluation phases (Longwe, 1997).

Global/International/World Development: A broad term that incorporates economic and social development as a means to improve the quality of life of people around the world (Eade & Suzanne, 1995).

Intersectionality: The term was first coined by civil rights activist and scholar of critical race theory, Crenshaw (1989), as a way to describe the multiplicity of discriminations suffered by Black women based on the 'intersections' of their race and gender. The term is used more broadly now to help analyse and describe the intersections of social divisions on a broad range of social categories (i.e. gender, race, class, faith and disability) (Anthias, 2013).

Power imbalances (social, structural and political): The inequitable distributions of decision-making, influence and resources resulting in some individuals or groups possibly denied access to their rights and capabilities (Gaventa & Cornwall, 2008).

Reflexivity: The ongoing reflective practice of identifying and adjusting to one's personal power and influence based on our own values, ideals, culture and biases. Being reflexive also acknowledges that as practitioners or researchers we are part of the system we are engaging with, not outside its boundaries as mere observers (White et al., 2006).

Social change: Variation in, or modification of, intrapersonal processes, patterns, interactions or structures as the result of widespread trends over time.

Systemic intervention: On its own the word has many definitions and intentions in academia, social work, psychology, medicine, economics, commerce, etc. Systemic intervention as it is used in this research, adapted from Midgley (2000) is: a purposeful and *participatory* action by an agent to collaboratively create locally defined social change. In essence, the systemic intervention described in this thesis involved decisions made by local stakeholders and me as collaborative 'thought partners' (see definition below) in the identification and inclusion of stakeholders, consideration of marginalised voices and creating culturally adapted participatory practices to respectfully engage input throughout the research project.

Thought Partner: Being a thought partner relies on the skilful use of inquiry and reflection to build capacity of individuals and organisations. This is achieved by stimulating thinking, assumptions, paradigms, and actions as a means to encourage innovation and transformation.

Abstract

Systemic intervention (Midgley, 2000) and Feminist Systems Thinking (Stephens, 2013a), both branches of Critical Systems Thinking, have been used widely to improve social and organisational systems. According to Midgley (2000), a systemic intervention can be defined as a “...*purposeful action by an agent to create change*” (113, emphasis original). Building on Midgley’s work, Stephens (2013a) created a non-hierarchical “...*framework for feminist systems thinking, as a set of five principles that provide common sense guidelines for applied research and social action...*” (8, emphasis added). Presently, the small amount of gendered systemic research is troubling in a world where *no* country has achieved gender equality.

The purpose of this research is to conduct a participatory systemic intervention working in partnership with a U.S. non-governmental agency in Washington D.C. in the United States, and Nicaragua in Central America, I conducted a feminist systemic intervention in an international development organisation. This study found that a more structured systemic intervention method, currently named Gendered Systemic Analysis, was needed to support stakeholders in identifying potential improvements in their businesses: previous work on Feminist Systems Thinking left too much of a gap between theory and practice. In this research, I follow Midgley’s (2011:11-12) use of ‘method’ as: “as a set of techniques operated in a sequence (or sometimes iteratively) to achieve a given purpose. GSA uses a boundary critique process, which concentrates attention on gender, nature and voices from the margin as a means to create social change.

The contribution of this research deepened the understanding of how to empower individuals and groups to engage with systemic thinking and contextualise its theoretical and methodological underpinnings into a local knowledge generating systems leading to more sustainable change.

Chapter 1 Introduction

Margaret Mead, a social anthropologist and early systems thinker (Ramage & Shipp, 2009), shaped her life around “doing work that matters” (Mead, 1972:114). Mead’s ideal of contributing to society is one I have given primacy both in my career and now in my doctoral research. My research is a call to action for systems thinkers, academics, practitioners, corporations and non-governmental organisations (NGOs), individuals and groups alike.

To date, not one country has achieved gender equality (United Nations Development Programme, 2013a; 2014a). According to the UN Gender Inequality Index (GII)¹, gender inequality is at the core of slowing global human development. Women and girls face discrimination in “health, education, political representation, labour market, etc. — with negative repercussions for development of their capabilities and their freedom of choice” (United Nations Development Programme, 2014a). In global development efforts, the definition of gender equality is intrinsically linked to human rights:

“Gender equality refers to the equal rights, responsibilities and opportunities of women and men and girls and boys. Equality does not mean that women and men will become the same but that women’s and men’s rights, responsibilities and opportunities will not depend on whether they are born male or female. Gender equality implies that the interests, needs and priorities of both women and men are taken into consideration, recognizing the diversity of different groups of women and men. Gender equality is not a women’s issue but should concern and fully engage men as well as women. Equality between women and men is seen both as a human rights issue and as a precondition for, and indicator of, sustainable people-centred development” (United Nations Women, 2014).

¹ The GII captures gender-based inequalities, also using three indicators: reproductive health (e.g. maternal and adolescent birth rates), empowerment (percentage of parliamentary seats occupied by women and secondary and higher education rates) and economic (e.g. market participation rate for women and men) (United Nations Development Programme, 2014b).

There are three global indexes that are helpful to understand the complexity of gender (in)equality: the UN’s Human Development Index (HDI)², the Inequality-adjusted HDI (IHDI)³ and the UN Gender Inequality Index (GII). Critics of the HDI say that the indicators are too narrow, and that the focus on national performance neglects some of the inequalities within nations (Sagar & Najam, 1998). Using Nicaragua as the focus of analysis, since it is where my field work took place, it ranks 132nd (see Table 1.1 below) out of 187 countries and territories on the UN’s 2013 HDI (United Nations Development Programme, 2013b). The good news is that, between 1980 and 2013, Nicaragua’s HDI increased by 27% (United Nations Development Programme, 2013b).

Table 1-1 - United Nations 2013 Human Development Indices (United Nations Development Programme, 2013a)

	Human Development Index (HDI)	Inequality Adjusted HDI (IHDI)	Gender Inequality Index (GII)
Nicaragua’s HDI, IHDI and GII Ranking compared to its comparable neighbours with similar populations:			
Nicaragua	129	86	89
Honduras	120	84	100
El Salvador	107	83	82
2013 Highest Human Development and Lowest Human Development Countries			
Norway	1	1	5
Niger	186	131	146
2003 HDI rankings for U.S.A. (Researcher’s Nationality) and U.K. (Researcher’s University location)			
United States	3	16	14
United Kingdom	26	19	34

The causes of inequality are pernicious and systemic, articulated through governmental structure and every level of society, documented by bodies of evidence that are quantifiable (e.g. wage earnings gap between women and

² The HDI is an annual global tool that summarizes average human achievements using three indicators: life expectancy, mean and expected years of schooling and gross national income. The HDI divides countries into four tiers of human development based on their calculated index: very high, high, medium and low. Nicaragua is considered to have a medium level of human development (United Nations Development Programme, 2014b).

³ The IHDI considers the inequality in HDI indicators and “discounts” the value according to its level of inequality” (United Nations Development Programme, 2013b:3)

men earnings for comparable work) and subtle (e.g. lack of women's mobility) (Sielbeck-Bowen et al., 2002). An analogy borrowed from an early systems contributor, Sir Geoffrey Vickers, alluding to the challenges faced by humanity, equally describes the social and economic trappings of gender equality. "A trap is a trap only for the creatures which cannot solve the problems it sets. Man traps are dangerous only in relation to the limitations of what men can see and value and do" (Vickers, 1972:15). On the day he was elected in 2015, Canadian Prime Minister Justin Trudeau was asked the following question by a reporter: "...you said it was important to you to have a cabinet that was gender-balanced, Why was that so important...?" He responded, "Because it's 2015" (CBC Radio Canada, 2015).

The tenaciousness of inequality is complex and is debated extensively in other bodies of literature (Sen, 1999; Walby, 2004; Perrons, 2005; Walby, 2007; Zammit et al., 2008; Blau et al., 2012; 2012; Patel, 2012; Kabeer, 2015a; 2015b; Milward et al., 2015; Perrons, 2015; Sen, 2016). From a feminist perspective, what is important to reflect on is how gender roles have evolved over centuries and these roles are now normative behaviours shaped by previous generations. Unfortunately, these norms, now imbedded into almost every organisational and societal institution, were created primarily by white, privileged, educated, men. These men with access to the 'public sphere' of society, were freely able to identify, discuss, and create resolutions about societal life's problems, largely without input from women (Brisolara, 2014). These debates and their male-dominated resolutions were then able to shape the political spheres that guided academia, law, government, judiciary and medical institutions, etc. Women, on the other hand, were often relegated to the 'private spheres' of society of family and home life. Consequently, women's experiences, and what they valued as priorities, were mostly absent (Brisolara et al., 2014).

Gender equality matters. Women roughly represent 50% of the world's population yet statistically represent 70% of the people in poverty.

Considering the systemic complexity of gender equality, I turned to systemic intervention, a branch of Critical Systems Thinking (described in depth in Chapter Two) which has been widely used to analyse and improve social and organisational systems. According to Midgley (2000:113), a systemic intervention can be defined as a “...purposeful action by an agent to create change” (emphasis original). Building on Midgley’s work, Stephens (2013a:8) created a non-hierarchical “...framework for feminist systems thinking (FST), as a set of five principles that provide common sense guidelines for applied research and social action...” (emphasis added). However, it is the research found within Gender and Development (GAD) that has provided the most guidance on how to build an equitable world that works for everyone (Derbyshire, 2002; Walby, 2005). Prioritising a gender analysis as the entry point into any project or policy, GAD asks that research and analysis be derived from, and grounded in, local contexts.

Looking at the breadth of intervention projects using systemic intervention theories, there remains a paucity of research within the systems thinking literature about the implications of gender (Stephens, 2013a). The ideals of gender equality versus gender equity are an important distinction to consider. Attaining a society where gender equality is fully realised suggests the hopes, concerns, needs, values, aspirations, and behaviours of all human beings are valued and considered equally, allowing them to freely reach their individual potential without engendered limitations (United Nations Evaluation Group, 2014). Gender equity requires that irrespective of a person’s gender identity they receive fair and equal treatment based on their needs, which in a development context often requires additional measures to counterbalance the historical and social marginalisation (United Nations Evaluation Group, 2014). Some feminists argue that gender equality is an unambiguous target and more must be done:

“...to change modern Western gendered social orders to be less gendered will mean changing everyday gendered

behaviour, modification of gender-organized attitudes and values, especially about families and children, but, most of all, a restructuring of the gendered division of work and redressing the gendered power imbalances in the governments of dominant nations. A movement to change the embedded gendered social order needs individual agency, informal social action and formal political organisations (none of which is separate from the others)" (Lorber, 2000:90).

Lorber (2000) advocates for a world that imbues gender equality. But realistically, gender inequality has been a pernicious scar on human development that has progressed and evolved over thousands of years. Progress has been made in the last century (e.g. the Suffragette movement, women parliamentarians) towards a more gender equitable world, however, the pace of change is limited.

When considering Critical Systems Thinking for this research, there is a question that needs to be asked when advocating for the imbrication of gender equality with systemic intervention. In the late 1990s, there was an ontological shift from "emancipation" to "improvement" as one of the key commitments (priorities) (Flood & Jackson, 1991d; Jackson, 1991a; Schechter, 1991):

"Emancipation: ensuring that research is focused on "improvement", defined temporarily and locally, taking issues of power (which may affect the definition into account" (Midgley, 1996:11).

Midgley (1996:16) argued that allowing for "human emancipation, rather than a more general commitment to improvement (and "sustainable improvement" in particular), does nothing to encourage people to challenge the automatic prioritisation of a human boundary in systems practice ". I agree with Midgley about the need for a broader definition of improvement to include human and non-human voices. I will discuss in greater depth about the

limitations around the use of 'emancipation' in Chapter Three, where Critical Systems Thinking is introduced more thoroughly.

What I do want to present, even problematize, is the term 'improvement', which is the term most commonly used as a core commitment replacing emancipation within systemic interventions (Stephens et al., 2010b; Midgley, 2014; Midgley, 2015). Any measurement of improvement is a personal construct shaped by a particular worldview (perceptions) which is intrinsically informed by our values, biases, cultures and beliefs. These worldviews need to be deliberated through dialogue in an effort to be transparent and explicit, particularly within a global development context where power imbalances are likely to be present. One person's improvement could lead to another person's disempowerment. Although the idea of "improvement" is fundamental to human rights, human development and therefore gender equality, there is a need to ensure that the interests and priorities of those voices that are actively or historically marginalised or disempowered are not forgotten (Maru & Woodford, 2000). As Rajagopalan and Midgley (2015:559) suggest, when identifying boundaries used to recognise problem contexts, "it therefore behoves us to sweep in and include as many affected people and aspects as we can think of, but without compromising intelligibility".

Inclusion of a multitude of voices is an essential element within the various global development fields about the best strategies for achieving gender equality. In the Gender and Development (GAD) literature, the gender mainstreaming approach, introduced in 1995, seeks to ensure that women's and men's concerns, voices, viewpoints and interests are integral to the design, implementation, monitoring and evaluation of all projects in an attempt to avoid "policy evaporation" with regard to gender equality (Derbyshire, 2002:31). The premise of evaporating gender-focused policies within international development bureaucracies is not new. Gender policies, many written with good intentions, others made as political concessions, sometimes

disappear during the design, implementation or evaluation phases, for they threaten the status quo of traditional patriarchal agencies/countries or they are forfeited to achieve other 'priorities' (Longwe, 1997). Another hypothesis suggests that their mostly non-binding status and flexible approach makes the policies weak as compared to more 'traditional regulatory and economic instruments' (Jacquot, 2010:118). The dissipative quality of gender equitable priorities during the policy implementation phase means that human rights for both genders can be severely impaired, barring people from contributing to, and benefiting from, national, political, economic, social and cultural development opportunities (van Eerdewijk, 2014). This negative impact is particularly pertinent for women, who globally represent 70% of the people living in poverty (Project Concern International, 2008).

The consideration of gender mainstreaming and its evaporation during implementation is a commanding one at the apex of the two literature and practitioner fields considered in this research: Critical Systems Thinking (CST) and GAD. While theorists and practitioners have not achieved a consensus on a definition of CST, there was some agreement on three key themes around which debate coheres (Midgley, 1996). Foremost, there was agreement on adopting a pluralistic selection of research methodologies and methods to address current and emergent issues (Flood & Jackson, 1991d; Midgley, 2000). Next, there was a focus on the practice of boundary analysis, critical awareness, or 'boundary critique', to identify the multiple perspectives that then set system analysis parameters, define the problems to be considered and give shape to solutions (Ulrich, 1983; Flood & Jackson, 1991d; Midgley, 2000). Other forms of improvement (understood critically, taking account of multiple perspectives) are legitimate foci for intervention too. Indeed, Midgley (1996) argues that the language of emancipation was not credible in a world where one person's 'progress' may be perceived as a setback by others, a predictable manifestation if one genuinely and respectfully acknowledges differences between people's

worldviews. What is evident from the literature was that Midgley won this argument: emancipation was hardly mentioned again in the subsequent twenty years of CST research.

CST's body of research has undoubtedly contributed to improving society in the private and public sectors (Jackson, 1985; Flood & Jackson, 1991c; Gregory, 1992; Ulrich, 1993; Romm, 1996a; Minnich, 2005; Änelmen, 2010; Stephens et al., 2010a; Cabrera et al., 2015; Rajagopalan & Midgley, 2015). Yet, for all its commitment to being 'critical' by stressing reflective assessments, CST has failed to adequately address the entrenched political and social barriers that keep women systemically marginalised. *Every political and social system* that guides the world powers today has been designed, defined and constructed primarily by men with privilege (e.g. education, wealth, Caucasian). The impact of these narrow definitions is systemic: our legal, medical, financial, educational, political, philosophical, economic, literary, and linguistic constructs, socially and structurally have all been androcentric⁴ in their creation (Spender, 1985; Minnich, 2005). Philosopher Elizabeth Minnich notes, "the dominant few not only defined themselves as the inclusive kind of human but also as the norm and the ideal" (2005:37).

This male-centric theology and ideology within systems thinking literature, has begun to be redressed by the work of Stephens (2013a) and through her grounded theory research resulting in the development of a Feminist Systemic Thinking framework. By contrasting CST and eco-feminism, looking for similarities and differences, Stephens identifies theories and practices within each individual field of literature that she used for self-reflection and critique of problems, programmes and systems (2013a). Her resulting framework offers five ethical principles: focusing on gender, nature, voices from the margin, societal change and pluralistic methodologies, which can be engaged during the

⁴ The practice, conscious or otherwise, of placing male human beings or the masculine point of view at the centre of one's world view and its culture and history (Plumwood, 1996)

design, implementation, evaluation or reflective activities of any project or programme (Stephens, 2013a).

As Stephens herself noted, Feminist Systems Thinking is not a methodology or a “method for applied practice” (2013a:9). However, when considering GAD’s decades of gender equality efforts in development contexts, I believe Feminist Systems Thinking can provide a useful systemic component to address the often systematic implementation of gender sensitive initiatives. The difference between ‘systematic’ and ‘systemic’ is important: ‘systematic’ means step-by-step, following a prescriptive formula; while ‘systemic’ (as will be discussed in Chapter Four) means being responsive to the values, interconnections, perspectives and emergent properties in the context.

Like Prime Minister Trudeau’s, my concern is not a new one: gender inequality has been resistant to change for centuries. What *is* new is a recent challenge to Critical Systems Thinking (CST) academics and practitioners to embrace a moral, social and political imperative for the inclusion of gender equality as a core value and awareness in *all* systemic interventions (Stephens, 2013a). In some global Northern countries (e.g. the United States and the United Kingdom), women were ‘given’ the right to vote late in the 1800s and early 1900s, while some countries today still bar women’s access to ballot boxes, denying them what many nations now consider a fundamental right as citizens (Lister, 1995). My call for action is not about privileging women’s experiences, although it could be seen as such initially. It is about ensuring awareness of gender equality issues and refusing women’s marginalisation.

1.1 The Research Problem

The primary purpose of this research is to improve and contribute to two critical and analytical theories within Critical Systems Thinking (CST): Systemic Intervention (Midgley, 2000) and Feminist Systems Thinking (Stephens, 2013a) which have much to offer to bring about a gender equitable world, particularly within a global development context.

In partnership with a U.S. based NGO, which I am calling ‘Global Development’ (Global) (to preserve confidentiality) and their Agricultural Network programme in Nicaragua, I conducted a systemic intervention for over three months. Working with both the organisational and programmatic infrastructures, I introduced Feminist Systems Thinking as a way to initiate critical conversations and guide decision-making on mainstreaming gender equality into their project. This thesis describes the methodological and application activities and outcomes from this systemic intervention, and my reflections on what more is needed beyond Feminist Systems Thinking as currently constituted.

As an international organisation development consultant, I have worked with dozens of projects. This work represents a unique part of my professional career whereby I volunteered with a worldwide agricultural programme funded by United States Agency for International Development (USAID)⁵. Global⁶ is a sub-contractor administering the Agriculture Network⁷ in the Caribbean Basin. Organisational development focuses on the structure and design of the organisation and how the organisation's systems, capacity and functionality, influence outputs.

My principal task as a volunteer has been to assess the individual, group and organisational needs of funded projects and then develop appropriate support

⁵ USAID is U.S. government agency primarily responsible for providing capital, knowledge and people in the form of foreign aid to impact poverty, disaster relief, bilateral aid, and socioeconomic development in countries with emerging economies (Roberts, 2014). The agency reports directly to the U.S. Secretary of State.

⁶ Global Development is a pseudonym for a sub-contractor NGO, which executes programme activities based on contractual agreements designed by USAID. The name was changed to protect the organisation from any possible or perceived political or financial reprobation as a result of the research findings.

⁷ Agricultural Network is a pseudonym for a USAID-funded, volunteer-based programme model in global development. As a volunteer organisation development consultant for Global, I conducted organisation development projects for them and submitted summary reports, while also having time to conduct unrestricted research. Global was responsible for paying for my travel, food and lodging.

and interventions. All of my Agricultural Network projects, many working with micro-enterprises owned by local women, are located in patriarchal cultures where the role of women-owned businesses struggle to evolve.

In a recent request for Agricultural Network funding for 2013-2018, USAID delineated the responsibility for prospective sub-contractors to describe and measure how they would provide equitable benefit distribution in their operational strategies to ensure gender equality in the field (U.S. Agency for International Development, 2013a). The increased awareness of gender issues and the culture shifts that funding opportunities initiate, are palpable. This is evidenced in comments expressed by some of the women I have worked with in previous Agricultural Network projects: e.g., “We are learning each day and can do things we did not know how to do before...Our brains wake up a little each day...It gives us purpose and motivation” (Lewis & Sherlock, 2009b:12). The empowerment the women and men experience from managing their own businesses and learning new knowledge often spills over to other parts of their lives as they step into leadership roles, organising themselves into farmer co-ops and advocating for their communities with local politicians.

My enduring commitment to gender equality and the empowerment of women, combined with my experience as an organisation development consultant and Agricultural Network volunteer, has brought me to this doctoral research. My world view on gender equality and empowerment is captured well by the World Bank’s Report 2012: “gender equality matters intrinsically because the ability to live the life of one’s own choosing is *‘a basic human right’*” (World Bank, 2011:3, emphasis added).

I observe that, despite the best efforts and commitment of the Agricultural Network staff, volunteers, and farmers, many gender equality priorities evaporate unnecessarily. Gender equality will not inevitably manifest as countries become economically successful. It is my belief that, by means of incorporating (and culturally adapting) a systems thinking approach into

organisation development consultancies, the women's enterprises could evolve more consistently through their organisational growth cycles and have increased stability and sustainability. Specifically, I argue that the use of a further developed form of Feminist Systems Thinking throughout the programme implementation process could significantly support the Agricultural Network staff, volunteers, and the rural business owners in understanding how their work is interrelated with, and impacted by, other parts of the organisational system.

Thinking systemically, I believe, is something we all do, every day, some more consciously than others (Cabrera et al., 2015). Everything from a mother considering what her new-born's needs are to a farmer planning his spring planting and fall harvest. I disagree with Steirlin (2004:35), a philosopher and systemic family therapist, who said, "Systemic thinking can only be learned through one's work; it cannot be instilled into others; it needs time to gather experience and to make mistakes". In my consulting practice in the U.S., the precepts of systems thinking were easy to introduce, comprehend and apply for a broad group of stakeholders. While working in projects in developing economies, I saw remnants of colonial trappings with the consultant being asked to provide training to rural farmers on 'how to' do things like action planning, but not the deeper philosophical debates about 'why' to plan. By using an explicit focus on boundary judgements, developing a pluralistic tool kit of flexible interventions and discussing how these efforts will improve and empower the rural farmers they support, the Agricultural Network hierarchy was able to develop a systems thinking lexicon and a shared understanding of how to approach ongoing and emerging problems (White & Taket, 1997; Bosch et al., 2015). This shared understanding could then be embedded in their training manuals for staff, volunteers and country offices.

As a way of establishing and maintaining a personal connection between myself and my readers, I have chosen to use a first person narrative to describe

my fieldwork. According to Hyland (1998:437), using a meta-discourse narrative is “accepted as a professional writing device” as a means to “reference her intentions, confidence, directions to the reader”. A major advantage of this approach is the opportunity to introduce myself as an ‘instrument’ in the research, utilizing my values, cultural background, professional experience and ideas as central to facilitating social change and action within a systemic intervention.

1.2 Research Questions

I suggest that Stephens’ (2013a) Feminist Systems Thinking commendably addressed the gender gap in Critical Systems Thinking that was increasingly difficult to ignore. There are however, four main constraints affecting the use of her framework in a development context such as Nicaragua. They are:

1. Feminist Systems Thinking is politically driven to enact change yet Stephens offer only principles suggestions as guidelines with the means to convert theoretical insights into practical interventions.
2. Feminist Systems Thinking was piloted with projects in Australia with different societal cultures and barriers than Nicaragua, calling into question the adaptability (e.g. literacy levels, Latino culture) of the principles and potential impact on core ethical assumptions of Stephens’ work.
3. The Feminist Systems Thinking framework was primarily piloted through a reflective process on previous projects by practitioners rather than conventional stakeholders. How effective will the framework be as a method to empower ‘ordinary’ women in rural Nicaragua?
4. Feminist Systems Thinking principles have a non-hierarchal design (all five principles are equally important); gender equality is not prioritised. Will the focus on gender equality be marginalised in the deployment of the other principles in a patriarchal society?

With the above concerns as background, I have identified three primary research questions to be answered in this study:

1. How can Stephens' (2013a) Feminist Systems Thinking ethical framework be further advanced in a culturally relevant way to support people in a global development context?
2. What are the strengths and weaknesses of Feminist Systems Thinking within a global development context such as Nicaragua?
3. What needs to change within the Feminist Systems Thinking framework to transition from a theoretical process into an intervention tool for practitioners and rural entrepreneurs, while still valuing its original ethical underpinnings?

1.3 Thesis Structure

For ease of reading this document electronically in Word, I recommend using the 'navigation pane' option (opening to the left of this document), which can be found under the 'view' tab in the tool bar. Additionally, the 'table of contents', 'tables' and 'figures' headings on pages viii-ix are hyperlinked and will take the reader rapidly through the text.

My thesis is divided into eight chapters. Chapter One gives a brief introduction to the recognised gender research gap in the CST literature, and also provides an overview of the research problem and provides a chapter by chapter overview. Following this exposition of the thesis structure and the overall research problem, Chapter Two introduces the evolution of the various systems thinking paradigms, beginning with 'hard systems' (a neo-positivist approach) and 'soft systems' (an interpretivist approach) to problem-solving. Both of these 'waves' of systems thinking had their champions and critics, and the paradigm war between them instigated a 'third wave' of 'critical systems thinking', described in Chapter Three. It is CST that forms the foundation in

which this research is rooted. Additionally, Chapter Three presents Stephens' (2013a) Feminist Systems Thinking framework as a decisive gendered systems approach.

Because of the sparseness of gendered discussions within the field of systems thinking, I felt it essential to turn to the Gender and Development (GAD) literature, which has grappled with gender equality issues for over half a century. Like the systems chapters earlier in the thesis, Chapter Four familiarises the reader with the global influences on women in development movements which, similar to systems thinking, had several 'waves' of theoretical development. In this same GAD chapter, gender mainstreaming, the predominant gender equality strategy still being used today, is also explained. Chapter Four contains my research questions.

Chapters Five to Seven represent a narrative of my fieldwork, which is divided into three intervention phases. Because my research took the form of a systemic intervention, this allowed me to respond to evolving situations using a toolbox of methodologies and methods (Midgley, 1989b; 1990; 2000). I have chosen to weave information about my methodological decisions throughout the fieldwork narrative, and have not presented them in a separate chapter. However, Chapter Five sets the context for my fieldwork, introducing my multiple roles (e.g. researcher, volunteer consultant, observer, colleague, and staff). Still in Chapter Five, Phase One of my fieldwork, which was located in Washington D.C., introduces the NGO Global Network and its volunteer-based agricultural programme. Chapter Six covers Phase Two, now in Nicaragua (Central America), working in partnership with the Nicaraguan Agricultural Programme staff. My dominant roles discussed in Chapter Six are the Feminist Systems Thinking 'expert' and organisation development volunteer, supporting the staff to launch their new five-year U.S. government grant. Subsequently, in Chapter Seven, I discuss my travel to remote regions of Nicaragua hosting Feminist Systems Thinking workshops with micro and small businesses in rural

communities. In this same chapter, a new and emergent model called Gendered Systemic Analysis (GSA) is introduced, providing a suggested process for use by practitioners, NGO staff, rural entrepreneurs and farmers. Chapter Eight concludes my thesis, summarizing my contributions to knowledge and suggesting future research.

1.4 Chapter Conclusion

This research, although guided by critical systems thinking, is also representative of other bodies of research, such as those contributing to Feminist and Gender and Development theories. The idea of thinking systemically, although logical in some respects, is actually very complex, even more so when the system is transversal across international boundaries and cultures. What is true for all countries and societies, however, is that the human condition of gender *inequality is well* represented and is *systemically embedded*. My research will not solve these enduring inequalities, for that is our collective responsibility as sentient beings, and one project alone is insufficient. Nevertheless, many of us (but by no means all) have the ability, fully or partially, to make individual choices. It is the potential for these individual choices to influence gender (in)equality that I hope to address with my research.

Women and men worldwide are often asked to participate in international development projects that require them to make important decisions impacting their finances and health, families and communities. If the basic human right of leading a fulfilling life is based on freedom from inequality based on class, ethnic group, country or gender, then gender equitable participation in development projects is crucial. Anything less and the pace of human development is slowed, or in some cases prevented entirely (United Nations Development Programme, 2013a). It is the human imperative to use a gendered lens that warrants explicit consideration by practitioners in the systems thinking field in general, and those CST practitioners who are active in

international development efforts in particular. The aim is to create a world that women and men participate in, and benefit from, equally.

I do not, however, want to establish a ‘realist’⁸ ontology for my research. Using a feminist systemic intervention or a “value-full, not value-neutral” approach according to Midgely (2000:70, emphasis original) means that I *do* want to change and influence gender inequality within society. My role is not a mere observer for according to Addelson, (1988:108) “...observation is inseparable from concept, then concept is inseparable from observation...”. My intent is to work with stakeholders in the identification of boundary judgments (See Chapter 2 for expanded description) as we look “outward” towards the world and also when looking “inward” or “back” at the systems which produce these “outward” judgements (Midgley, 2000:80). As a scholar and practitioner, remaining neutral is also unachievable. Striving to be “morally and scientifically responsible” (Addelson, 1988:122) while acknowledging that my leadership in the intervention has intrinsic has power inequality implications is possible. I want to provide responsible service to the people I am working with in an attempt to look for mutual opportunities to learn about what can be done to address the inequality within each context in which we are working.

Traditionally, researchers’ philosophical paradigms are a way to guide how they make decisions and carry out their research. A case could be made that as noted in the previous paragraph, the use of a feminist systemic intervention approach might suggest I have a particular philosophical stance (feminist, realist, etc.) to embrace. Yet, my resolution is to not align myself with one particular paradigm but instead to adopt a pluralist approach. I agree with Midgley (2000:77) who advocates that a “...plurality of theories ultimately yields more insights for intervention than if we work from one position alone. ...this raises two thorny issues: how to justify moving between theories that

⁸ Philosophically realists accept a situation as it is and therefore accept situations as being what they are and react accordingly (Miller, 2010).

make contradictory assumptions, and how, practically speaking, to exercise choice between theories in the context of intervention”.

My pluralist approach is to acknowledge and respect the lived experiences of the stakeholders I meet and work with in this research. They are the best experts on what norms, values, social rules exist and from their perspective and from conversations, how or if the Feminist Systems Thinking (Stephens, 2013a) framework has meaning for them and whether ‘action for improvement’ is an activity they implement. One enquiry I raise during this research, is how individuals will individuals be able to generate action for improvement if the larger societal norms are not equally motivated? Blumer (1969:19) maintains: “it is the social process in group life that creates and upholds the rules, not the rules that create and uphold group life”.

Chapter 2 Systems Thinking: Its Journey

Systems theory first evolved as a response to mechanism and reductionism; scientific principles which suggest that 'whole' systems can best be understood by viewing them as aggregates of their simplest elements (e.g. cells in biology, needs in psychology) and applying universal laws based on objective and value-free empirical testing (Ackoff, 1974). It was an analytical way of explaining a phenomenon by breaking it down into parts, analysing the behaviour of those parts individually, and then reassembling the partial explanations to describe the whole (Boulding, 1956; von Bertalanffy, 1956; 1968; Ackoff, 1974; Churchman, 1979). Angyal (1969) and von Bertalanffy's (1956) work gave new understanding to the study of biological systems as complex wholes and not just aggregates:

“...it is necessary to study not only isolated parts in the process; but the essential problems are the organising relations that result from dynamic interaction and make the behaviour of parts different when studied in isolation or within the whole”(von Bertalanffy, 1956:1).

Von Bertalanffy observed that systems can either be 'closed', and not interact with their environment, or 'open', taking inputs from their environment, transforming them, and outputting back into the environment, which led to his best-known work called General System Theory (von Bertalanffy, 1956; 1968). Through general systems thinking, an understanding emerged that an 'open system' in biology which interacts with its environment, could be applied to other phenomena such as the human psyche, social institutions, families, galaxies, management systems and organisations (von Bertalanffy, 1956; 1968; Ackoff, 1974; Churchman, 1979; Checkland, 1981a).

General systems thinking was soon adopted by management thinkers, such as Ackoff (1974) and Checkland (1981b) who saw the applicability to the study of organisations as more than just a way of representing the real world: they

recognised that systems theory provides a *way of looking at phenomena* that can generate insights. This represents an epistemological shift from an initial assumption of objectivity to a recognition that the observer (or, more accurately, the *intervener*) uses systems *thinking* (rather than *systems science*, as it was originally labelled) as a lens with which to construct meaning.

Today, systems thinking is an expansive umbrella term providing many choices of theories and methodologies that can be used to wrestle with the complexities of problematic phenomena. Systems thinking has been especially helpful when issues are 'messy', a term first coined by (Ackoff, 1974). Messy issues can be described as more complex than others because they have longer-term implications, more people and interdependent components, high levels of uncertainty, or the presenting problem is not really the problem at all (Reynolds & Holwell, 2010).

According to Midgley (2000), three overlapping and yet distinct 'waves' of systems thinking have evolved. Each wave does not replace but builds upon the previous one, adapting and responding to either new ideas or new features of contexts of application (Midgley, 2000; 2006b). Another designation used to describe the developmental stages of systems thinking is Hard Systems Thinking (First Wave), Soft Systems Thinking (Second Wave) and Critical Systems Thinking (Third Wave) (Jackson, 1991a; Midgley, 2000; Jackson, 2003; 2006b).

2.1 Chapter Structure

This chapter will review key literature that will provide an overview of the early decades of systems theory evolving into two methodological and theoretical 'waves', Hard Systems Thinking and Soft Systems Thinking.

2.2 First Wave: Hard Systems Thinking

The first wave of systems thinking is often called 'Hard Systems Thinking' because of its emphasis on quantitative data (Checkland, 1981a). This wave

shifted away from the commonplace reductionist approach used in the natural sciences to a problem-solving approach that assumed that systems exist in the 'real world', and models of them can represent that reality and be used to support prediction and/or learning about the systems in question (Jackson, 2003; Pidd, 2003; Midgley, 2006b). Examples of first wave hard systems thinking approaches include:

- *Systems Engineering*: an interdisciplinary science of designing and managing complex, whole, integrated organisational systems, focusing on the appropriate roles and efficiency of subsystems. Systems engineering addresses work processes, optimization, and risk management over the system lifecycle (Hall, 1962; Jenkins, 1972).
- *System Dynamics*: A methodological and modelling approach to help understand the dynamic behaviour of complex systems by recognising the numerous connected and sometimes time-delayed relationships between components of a system over time (Forrester, 1961; 1969; Meadows et al., 1972; Senge, 1990; Maani & Cavana, 2000; 2007; Anderson, 2014). A notable application of systems dynamics was in the Club of Rome project on anticipating the limits of economic growth due to resource constraints and environmental side effects (Meadows et al., 1972).
- *Systems Analysis*: Brings the knowledge and methods of modern science and technology to ameliorate societal problems and support action on policy issues by systemically analysing multiple solutions, providing evidence and potential outcomes on issues such as cost, effectiveness and risks (Miser & Quade, 1985).
- *Viable System Model*: For an organisation to be 'viable', it must be able to respond effectively to environmental changes and opportunities (Beer, 1959; 1972; 1989). The model proposes that this kind of responsiveness is dependent on five organisational functions and the

effective communication between them. These functions are: implementation, coordination, control, development and policy (Beer, 1959; 1972; 1989). Use of the viable system model supports diagnosis of threats to organisational viability.

2.2.1 Critique of the First Wave

Criticisms of first wave systems thinking include the following:

- There is nothing in the methodologies to lead practitioners to question management's goals and objectives, as the focus is primarily on efficiency and effectiveness. This could lead to unjust or undesirable policies and products being pursued with greater success (Jackson, 2003);
- The methodologies say little or nothing about taking into account the plurality of voices and values from diverse stakeholder groups, risking excluding important insights from people outside management (Checkland, 1981b; Jackson & Keys, 1984). Indeed, it has been noted that the lack of design input by broader stakeholder groups has resulted in some ineffective or abandoned projects (Rosenhead, 1989);
- Some practitioners of the first wave systems built 'super models' with too much complexity to be useful in real projects, thus wasting millions of dollars (Lee Jr, 1973);
- The methodologies failed to support practitioners in understanding the sophisticated nuances of how power and politics can determine and influence outcomes (Churchman, 1970; Checkland, 1981a; Rosenhead, 1989; Jackson, 2003; Midgley, 2006b).
- A key criticism of hard sciences is the assumption of a correspondent given set of systems structures (society, culture and language) that are 'universally' known and said to 'exist'. This leads to nothing critical or reflective about the assumptions they make prior to the design and intervention practice (experiment) or how this might influence the

interpretation of their work – particularly the exclusion of views other than their own (Jackson, 1982; Jackson, 1983; Midgley, 2000).

In most complex systems, such as global development, where there are multiple cultures, perspectives and power relationships that interact and inform each other, relying solely on a hard systems approach would be insufficient. For example, as mentioned in my introduction, the historical privileging of male voices over female voices has led to a gap in understanding and knowledge creation about how society might have been organized differently if women had had equal access and input to those debates (Spender, 1985). The value of including multiple perspectives also can be understood by considering theoretical and methodological pluralism which has been widely accepted by in the systems field, particularly those practitioners that are conducting interventions (Midgley, 2011). The practicality of both theoretical and methodological pluralism allows for the agent/agents who have a commitment to creating ‘action for improvement’ to remain responsive to what they encounter or is invoked in the local contexts:

“A common property of most foundational epistemological theories is a dualism between the subject and object, or knower and known: in seeking a general theory of knowledge generating systems, systemic action researchers can easily slip into viewing knowledge of the latter as somehow more fundamental than other types of knowledge. This is why it may appear acceptable to explain the generation and use of multiple theories of the world in terms of a single, foundation theory of the agent” (Midgley, 2011:12).

In response to the first wave of primarily positivistic analysis, participatory methodologies began to be developed within the systems.

2.3 Second Wave: Soft Systems Thinking

Many lessons were learned as the criticisms of hard systems thinking unfolded, and this facilitated a shift to a new interpretive paradigm and associated methodologies that emerged during the *Second Wave* in the late 1960s to late 1980s. Systems thinking authors were challenged to build methodologies that addressed multiple perspectives and viewed systems theory as a *way of thinking about issues and possible actions*, not as a means for representing real world entities (Churchman, 1968; Checkland, 1972; Ackoff, 1974; Midgley, 2000; Jackson, 2003). The significant paradigm shift from 'hard systems' to 'soft systems' prompted scientists and practitioners to question the idea that modelling is the province of experts; instead, multiple perspectives on systems were acknowledged, and participatory practice embraced. A strong emphasis was placed on the creation of opportunities for discussion, input, and collaboration towards action (Mason & Mitroff, 1981; Jackson, 2006). There was also a shift to the consideration of ideal types of human activity systems that might bring desired changes in the real world (Checkland, 1999; Midgley, 2000). In other words, in Checkland's work, the word 'system' came to be applied to a model of human activities that does not yet exist, but if implemented could bring about social change. The subsequent systems thinking efforts expanded the field significantly.

Churchman's (1970) initial work on boundaries was crucial in shaping both the second and third waves of systems thinking. How a decision is made (process), what is included and/or excluded (content), why the decision should be made, and who is involved (pluralistic viewpoints) are all variables that have significant impacts on a given project and subsequent outcomes (Churchman, 1970; Ulrich, 1983; Midgley et al., 1998; Midgley, 2000). During the first wave of systems thinking, researchers strove to attain a 'comprehensive' understanding, and come as close as they could to an 'objective' understanding, of the particular problem being studied (Midgley, 2000). In the second wave of

systems thinking, the question of the human ability to 'comprehensively understand' any complex system was first challenged by Churchman who posited that this is 'unfeasible' due to our constraints as human beings with our locally situated realities and our inability to comprehend the full interconnectedness of phenomena (Churchman, 1970). However, not being able to achieve completely comprehensive understanding should not deter practitioners from exploring other situated and limited perspectives. *Full* understanding may be impossible, but *greater* understanding *is* possible.

Reflective processes should challenge our assumptions, support us in examining boundaries, and reveal the social and personal constructs that might affect our work (Churchman, 1970; Ulrich, 1983; Midgley, 2000). Moreover, with the willingness to accept that system boundaries are socially constructed, it is possible to expand our understanding of what knowledge can be 'swept in' and who should be involved with the identification of the system's boundaries (Churchman, 1970). The delicate balance is therefore to collect enough knowledge from various viewpoints to inform an analysis and design an intervention without saturating the process with too much data resulting in decision paralysis (Ulrich, 1983).

Some examples of second wave methodologies:

- *Soft Systems Methodology*: Checkland contends that, even though the soft systems methodology model has seven steps, practitioners should use it as a heuristic tool for inquiry and not as a prescriptive process (Checkland & Scholes, 1990; Checkland, 1999). In the original model four steps were designed to explore the complexity of the 'real world' situation to be studied. Two steps were designed to view potential solutions conceptually through a 'systems thinking' lens (how the problem might/ought to be addressed through a system of human activities). One step straddled both the real and the systems thinking worlds, facilitating the assessment of potential

solutions for feasibility and desirability in relation to the problematic situation (Midgley, 2000). For practitioners this allows an action-oriented learning process. Potential transformations (proposals for change) can be analysed from different perspectives (Checkland, 1972; 1981b; Checkland & Scholes, 1990; 1999).

- *Strategic Assumption Surfacing and Testing*: This methodology, which builds on Churchman's (1968; 1971) earlier work, evaluates alternative ideas about strategy through the deep exploration of people's assumptions as a part of 'dialectical' debate (dialogue between perspectives leading to a new synthesis). Strategic Assumption seeks to promote the participation of both those involved in designing the strategic alternatives and those impacted by them (Mitroff & Emshoff, 1979; Mason & Mitroff, 1981; Mitroff & Mason, 1981a; 1981b) .
- *Interactive Planning*: Ackoff's (1974; 1981a) Interactive Planning differs from many other approaches, for it recognises that complex issues often require long-term thinking and action. As a participatory process, Interactive Planning invites stakeholders to plan in two separate yet interrelated modes of 'idealization' and 'realisation'. Idealization means projecting where the organisation wants to be in the future; while realization involves detailed action planning (Ackoff, 2001). While this sounds very like conventional strategic planning to today's ears, the main innovation is in the methodology for idealization. First, it is highly participative: Ackoff insists that representatives from across the entire organisation are involved, as they all bring different and useful perspectives. Second, only three rules are applied: the ideal future must be technologically feasible (using existing or new technologies), viable (financially, socially and environmentally) and adaptable (to respond to future change). Ackoff's process of 'idealized design' sets out to liberate participants from the constraints of today's

assumptions about what is or is not possible, and to harnesses their creativity (Ackoff, 2001).

- *System Dynamics* was primarily grounded in mathematics during the first wave of systems thinking, began a paradigm shift in the 1980s. The emphasis shifted from prediction of the dynamics of real-world systems to the use of models to facilitate participative learning among stakeholders. Also many models were qualitative rather than quantitative (Senge, 1990; Morecroft & Sterman, 1994).

The participatory consideration was a big shift for systems thinking. No longer was the analysis of a system, its problems and opportunities looked at merely through objective lenses, but also subjective ones. But as with any critical theory, reflection on the methodologies identified that participation can be hampered significantly by issues of power influencing or controlling the behaviour and input of people.

2.3.1 Critique of the Second Wave

As with the first wave of systems thinking, criticism of the second wave methodologies grew between the late 1970s and early 1990s. The efforts by Churchman (1970), Ackoff (1974) and Checkland (1981b), the key authors within soft systems, were limited by several theoretical challenges. Social scientists acknowledge that world views are socially constructed by individuals and groups resulting in different and often conflicting understandings of the same problem (Jackson, 1985). Simultaneously these individuals and groups may not have been fully aware of the external world constraints affecting their perspectives (Jackson, 1985). With the abandonment of the “predict and control” criteria left behind in hard systems which relied on scientific experiments to validate theories, soft systems methodologies relied instead on stakeholder participation to check for accuracy of intervention results (Jackson, 1985:141). Nevertheless, this “participatory validation” provided an opaque

validation of human nature's relationship with social contracts and constructs shaped by hard-to-detect elements of privilege, power and coercion (Jackson, 1985:144).

There were several salient and related concerns of soft systems methodologies: the conviction that plurality would support the exchange of ideas, neglecting to consider the structural features of society which are shaped by power and decision dynamics creating distortions of the free exchange of ideas (Thomas & Lockett, 1979). Also debated was the absence of emancipatory theory and practices, specifically to address power relations (Thomas & Lockett, 1979; Mingers, 1980; Jackson, 1982; Mingers, 1984; Jackson, 1985). Jackson's (1985) critique of soft systems practitioners (e.g. Ackoff, Checkland) noted that while participatory opportunities increased, actual influence was less probable:

"Open debate in which concerned actors achieve a consensus about the nature of their objectives and the changes they wish to bring about in the social systems...depended upon all stakeholders of a systems being prepared to enter into a free and open discussion about changes to be made...Yet it is surely unrealistic to expect all stakeholders to be willing to enter into such a debate. Privileged stakeholders (in terms of wealth, status or power) are unlikely to risk their dominant position and submit their privileges to the vagaries of idealized design...if they (soft systems thinkers) take their own criterion seriously, will have to steer clear of the very many social systems where full and effective participation cannot be established" (Jackson, 1985:129).

Therefore the paradox of the second wave methodologies was that whilst they were effective in diversifying stakeholder input beyond senior management, they lacked explicit strategies for addressing authentic participatory practices and were therefore supportive of the status quo (Thomas & Lockett, 1979; Mingers, 1980; Jackson, 1982; Jackson & Keys, 1984; Mingers, 1984; Munro, 1999; Midgley, 2000).

From a methodological standpoint, the second wave was also critiqued for its relatively narrow philosophical framing which created an 'isolationist' tendency (unwillingness to consider other approaches with different philosophical assumptions). This constricted view undervalued potential contributions of first wave (hard) systems thinking and relegated critical theory and practice that might help address power relations (Flood & Jackson, 1991d). Many authors called for a 'pluralist' approach that could align the first and second wave systems thinking with different contexts, and could facilitate the design of new, more critical approaches that could address contexts characterised by strong power relations, in which first and second wave methodologies have limitations.

The limitations of soft system methodologies were particularly constraining when one considers the role of organisational development in developing countries. Organisation development as a field, uses behavioural sciences knowledge to support planned change and improvement to organisations and their employees (Beckhard, 1969). While there is a need to explore multiple perspectives on what counts as 'improvement' (Pieterse, 2001), and soft systems methodologies were good for this, once the objectives have been defined, some of the first wave approaches might provide additional insights by embracing a participatory methodological/ epistemological pluralistic approach. Regarding capacity developing in development contexts there is a heightened concern because of the tendency of interventions to reinforce the positions and perspectives of the people who hold the most authority (Jackson, 1982; Jackson & Keys, 1984; Jackson, 1985; Munro, 1999; Midgley, 2000).

This limitation of soft systems is particularly relevant when considering gender equality, taking into consideration that issues of control, of access to resources and participation are key barriers to women's economic progress in the world. Although women's fortunes have expanded within the global economy and were an explicit emphasis in development efforts in the 20th

century, they still fall short of those benefiting men. Women have fewer numbers in the workforce; are paid less on average than men for the same job; represent a majority of workers in low-wage jobs, and are severely underrepresented in upper management and on board governance (Eikhof, 2012). Poignantly enough, women are completely absent from soft systems literature to date.

Even with the critiques of hard and soft systems thinking practices, the evidence shows a commitment of theorists and practitioners to continually reflect on their work and strive for improvement. It is this effort for action and improvement that ultimately led to the third wave of critical systems thinking.

2.4 Chapter Conclusion

For someone new to systems thinking as I was, the vastness of systems theories, methodologies and methods and contributors was daunting. Each new iteration emerged and built on previous ones driven by discourses, some contentious, about the strengths and weaknesses of the ones that had come before. Hard systems were too positivistic and narrow in their modelling and understanding of the real world. Soft systems, although interpretive and participatory, were not able to deal with challenging the status quo or power differentials. The importance of thinking systemically is recognised by many sectors including global development (Wiek et al., 2011; Burns & Worsley, 2015). According to Wiek et al. systems thinking is: “the ability to collectively analyse complex systems across different domains (society, environment, economy, etc.) and across different scales (local to global), thereby considering cascading effects, inertia, feedback loops and other systemic features...” (2011:207).

Yet when considering the evaporation of gender equality policy within the global development context, the weaknesses of the first and second wave of systems thinking are clear. Their research is mostly situated within empirical management sciences and the early systems thinkers fail to address issues of

implicit or explicit power and coercion intersecting with race, class, North/South, indigenous, gender and sex etc.

The link between systems thinking research within management sciences and the relationship to gender equality efforts in development contexts may not be clear to the reader, but will be explained thoroughly in Chapter 4. The central preoccupation of the Global North's efforts to reduce social and economic inequalities and dependencies focused on neo-liberal policies (e.g. privatization, fiscal austerity, deregulation, free trade, and reductions in government spending) using management science practices (e.g. problem solving, decision making, economics, business, engineering) to address the 'wicked problems'⁹ of the world (Schild, 2015). Although women and men were included in development programmes, women were not initially recognized as being economically essential to the economics of their countries (Rathgeber, 1990; Razavi & Miller, 1995). Additionally, merely integrating women into programmes without a gender analysis resulted in the reinforcement of existing power structures of inequality (Rathgeber, 1990; Razavi & Miller, 1995).

This complexity of power subtleties and limited boundaries to access power is a theme I have witnessed often in my global development work, where stakeholders are often disempowered by poverty. Although power barriers can never be completely erased, new methodologies that may be able to equalize the imbalance needed consideration.

⁹ The term 'wicked problems' as used in systems science is attributed to Churchman (1967) who stated that operations research had a moral responsibility "to inform the manager in what respect our 'solutions' have failed to tame his wicked problems" (B142).

Chapter 3 Critical Systems Thinking: Story of Emergence

The dynamic development of systems thinking was about to enter its most vibrant era. Not unlike the children's fairy-tale, Goldilocks and the Three Bears (Brett, 1987), in which Goldilocks by trial and error finally found the most comfortable bed to sleep in, systems thinking tested and adapted its theories over decades, building on previous knowledge through trial and error. As we learned in the previous chapter, hard systems methodologies were seen as too positivistic and narrow in their modelling and understanding of the real world (Jackson, 1991a). Soft systems methodologies, although more interpretivist and participatory, were not equipped to challenge the status quo or uncover power differentials (Jackson, 1991a).

The imperative became clear. There was a need to reach beyond the positivistic analysis of hard systems, which did not distinguish between the social world and the physical world. The advent of soft systems, which used interpretivism/subjectivism analysis, did recognize the influence that people's changing perceptions and understandings had within a system but was silent on the issue of how to manage power dynamics or deal with coercion (Mingers, 1984). What was needed were processes that could critically reflect, create action and social change yet remain flexible enough to respond authentically to emergent ideas from diverse perspectives.

3.1 Chapter Structure

In this section I will provide a brief summary of each of the other nine sections in Chapter 3. Section 3.2 will discuss the many discourses that helped build critical systems thinking (CST) and how it changed over decades. The process of being 'critical' in systems was rooted in critical theory shaped by multiple theorists. Their contributions will be explained in Section 3.3. Section 3.4 will describe the first generation of CST, and Sections 3.5 and 3.6 will cover the second generation (which brings us up to recent developments in the field).

In Section 3.7 I bring us to the present literature of CST as used in global development contexts. Section 3.8 focuses on the few CST articles that touch on the topic of gender over the past 20 years. Section 3.9 brings us up to date with gender and CST when I introduce a framework which is the foundation for my field work in Nicaragua, Feminist Systems Thinking. Section 3.9 will summarise the chapter and mark a transition to Chapter 4, where I will review feminist literature within a global development context and its efforts to 'gender mainstream' women's needs and concerns within the international development sector and sustained by feminist research.

3.2 Third Wave: Critical Systems Thinking

Interestingly, the global development field and the systems fields were struggling with similar demons during the 1980s-1990s. They were both pushing against the contemporary reductionist ideology which was taking slight account of the plurality of voices and values from diverse stakeholder groups (Checkland, 1981b; Jackson & Keys, 1984; Moser, 1989). Soft systems theorists such as Ackoff (1982), Checkland (1982), and Churchman (1982) all responded in kind to the critique by Jackson (1982; 1983) who suggested the need for a new paradigm to address issues of coercion, which the first and second wave of systems thinking had been unable to tackle. As both fields struggled with ways to increase participation and decrease marginalisation, new approaches based on previous experiences and critiques began to emerge.

Critical Systems Thinking (CST), or the Third Wave of systems thinking, "intervenes in understandings of relationships between people dealing with problematic situations" (Midgley & Ochoa-Arias, 2001:626). This was an attempt by systems thinking to deal with complexity at the interpersonal level and was a deliberate response to the failures of previous generations of CST. CST has had to date two generations of discourses: the first presented by

Jackson (1985; 1991b) and further elaborated by Flood (1990b) and then jointly by both authors (Flood & Jackson, 1991d; 1991a).

Given that it was born out of a broader systems theory body of research, Midgley (1996) pointed out the improbability of a consensus on a definition for this expansive body of knowledge to be comfortably adopted by all waves and schools of systems thinkers. Nonetheless, there are key commonalities that resonate throughout systems literature. Systems are complex with interrelated and interconnected parts. There are many viewpoints within systems which can be analysed, each providing insight or highlighting the dominant or subordinate levels. Systems can sometimes demonstrate emergence, which is unpredictable, flexible and changeable. Some systems, however, are closed and highly predictable and do not give rise to emergence, such as hard systems, which naïvely tried to use modelling within social contexts. These early attempts to meld scientific or mathematical modelling to social systems relegated emergence into obscurity, such that it often went unnoticed or even unconsidered. The emergence of most systems is influenced by internal and external influences, feedback loops, sub-systems and boundaries (Midgley, 2000).

The second generation of CST began to truly shape its identity as an emancipatory paradigm in the 1980s and early 1990s with the publication of two highly influential publications: Ulrich's book *Critical Heuristics of Social Planning* (CSH) (Ulrich, 1983; 1987) and Jackson and Keys' *Systems of Systems Methodologies* (SoSM) (Jackson & Keys, 1984; Jackson, 1988). The changing discourses within CST, which are still ongoing today were spurred by critique of the previous 'wave' of systems practices citing several related concerns. Jackson and Keys, for example, highlighted the perceived unintended reinforcement of the status quo by managers in organisational contexts suggesting that practitioners were naïve about existing power differentials (Jackson & Keys, 1984). Another observation was the inability of interpretative

theory, from which soft systems drew guidance, to deal properly with emancipatory theory and practice (Flood & Jackson, 1991d). Similar to hard systems, the 'isolationist' approach of the key theorists (Churchman, 1979; Ackoff, 1981b; Checkland, 1981a) relied primarily on interpretivism¹⁰ while rejecting the use of other potentially complementary paradigms during an intervention (Flood & Jackson, 1991d). Central to the critiques was the need for more promotion of participatory problem-solving strategies taking into consideration marginalisation of stakeholders (Flood & Jackson, 1991d; Flood & Romm, 1996; Midgley, 1996). And finally, practitioners required a broader tool-kit to support and improve modern-day problems (Brocklesby & Cummings, 1996).

3.3 Critical Theory Shapes CST

Before unfolding the particulars of the emergent critical systems approach, mainly the influences of CSH and SoSM, it is helpful to briefly introduce critical theory itself. The term 'critical' was coined by Horkheimer in 1937, to describe the work being produced by the Frankfurt School¹¹ in Germany, and the early 'critical' underpinnings of CST were predominantly derived from a contemporary German philosopher Jürgen Habermas'¹². Of particular interest was his earlier (and later abandoned) *Theory of Knowledge Constitutive Interests (KCI)* published in *Knowledge and Human Interests* (1972) and his later work, the

¹⁰ Interpretivism is "associated with the philosophical position of idealism, and is used to group together diverse approaches, including social constructivism, phenomenology and hermeneutics; approaches that reject the objectivist view that meaning resides within the world independently of consciousness" (Collins, 2010) An interpretivist approach prioritises understanding and appreciating differences between people (Saunders et al., 2012)

¹¹ The Frankfurt School of Critical Theory in Germany was formed between the World Wars and included many theorists and dissidents (all male) who were critical of both capitalism and Soviet socialism. Originally, the School was interested in why Marx's predictions about a socialist revolution did not transpire as anticipated and to further study how Marx's work could help inform the emergent twentieth-century capitalism (Wikipedia, 2015b).

¹² Habermas is a German twentieth-century philosopher and social critic born in 1926, who wrote in the tradition of critical theory and pragmatism and is most closely associated with the Frankfurt School. His best known theories are on communicative rationality and the public sphere (Wikipedia, 2015b).

Theory of Communicative Competence, published in a two-volume set called the *Theory of Communicative Action (TCA)* (Habermas, 1984a; 1984b). Some early works of CST theorists (e.g. Flood, Jackson) were influenced by KCI with other theorists (e.g. Midgley, Mingers, Ulrich) relying more heavily on TCA. Habermas, as with most of Frankfurt School critical theorists, had a fairly aligned agenda to shed light on and break the bonds from the dominance of positivistic/scientific/instrumental paradigms that to date had informed and driven thought, science and society (Finlayson, 2005). Helpful to frame critical theory, is its deep relationship with the Enlightenment tradition or the Age of Reason (1650s to the 1780s), which heralded a profound human awakening, challenging institutional constructs of divine rights (e.g. monarchies, religion, feudalism) to command and control people's lives and choices. The Enlightenment genre sought reason, analysis and individualistic principles (Alvesson & Willmott, 1992). Critical theory positions itself as highly reflexive or 'critical' by not aligning with any historical or current societal theories or practices. Instead it seeks to remain open and to question the values, assumptions, beliefs, norms and constructs that have given the theories form (Bronner, 2011). This deep critique goes beyond an observer viewing the subject or topic from a distance, a radical shift in concepts for the era.

Inherently present in any analysis, is the effort to deeply reflect on the meaning of the critique's components and how they interact, including the consideration of potential biases and self-interests. Critical theory explores the connections, overlaps, intersections, and interferences among three spheres: economic development, cognitive life and culture (Buchanan, 2010). By engaging with the discourse of human need, critical theorists deconstructed relevant social constructs which contributed greatly to the omnipresent quest for more autonomy in private and public spheres and individual rational autonomy. Fay suggested that critical theory contributions influenced "members of a society to alter their lives by fostering in them the sort of self-

knowledge and understanding of their social conditions which can serve as the basis for such an alteration” (1987:23).

Critical theory, which uses reasoning as a reflective process, has many roots with early philosophers like Kant (1724–1804) who named moral autonomy as the most valued human attribute. There was Hegel (1770–1831) who argued for achieving self-determination through full self-consciousness in order for humanity to progress. Additionally there was Marx (1818–1883), an economist among other things, who believed that societies progress through class struggle between the labourers of the world and the proprietor class (Buchanan, 2010; Bronner, 2011). What was most persuasive to later critical theory philosophers such as Horkheimer, Adorno, Marcuse and Habermas was that these earlier critical philosophers demonstrated new understandings in their debates, breaking with historical social shackles and moving from a mere theoretical debate to a practical application in the real world (Habermas, 1976; Brocklesby & Cummings, 1996).

Habermas’ work, which was very influential in the creation of CST, uses a pragmatic communication approach. Habermas posited that in efforts to reach agreement through dialogue and debate, we were restricted by human limitations in distinguishing when and if the ideal conditions are in place, and if they are right for achieving a true consensus. Habermas (1984b) argued that an “ideal speech” situation that allowed for equality and mutual exchanges could be achieved by participating in “consensually regulated conflict, where individuals’ true undistorted interests are laid bare in a debate among equals” (Brocklesby & Cummings, 1996:746). Likewise, Habermas was pragmatic in acknowledging the unlikelihood of people being able to achieve the “ideal speech” yet reasoned that even with our divergent thoughts, values, perspectives and interpretations, we were still able somehow to communicate with each other (Brocklesby & Cummings, 1996; Fultner, 2010).

The utopian state as theorised by critical theorists from Kant to Habermas suggesting “equality and consensus” relies on several idealistic and elusive assumptions. Brocklesby and Cummings (1996) listed a series of considerations we need to make concerning these assumptions. The first assumption is that inequalities represented by power, human influence and classification should be equalised, and valued. The second assumption is that humans are essentially ‘good’ and are consequently committed to rectifying the inequalities (Brocklesby & Cummings, 1996). The third assumption is that, if we are to jointly fight against inequalities, there is a need to identify objective criteria to determine what are ‘good’ or ‘bad’ qualities. Once the criteria are identified, one can thus measure situations that are able to be improved. The fourth assumption is that stakeholders must be able to agree about what they collectively value and consider if they are worthwhile endeavours to achieve.

One aspect ignored by early critical theorists (e.g. Adorno, Habermas) about equality and consensus was what the role, if any, gender played in the march toward emancipation. Regina Becker-Schmidt, a student of Adorno and considered to be a second wave Frankfurt school critical theorist with Habermas, notes:

“At most, it has been feminists who have productively analysed Adorno: his radical questioning of instrumental reason has found its way into concepts of androcentrism. But even here, his sociological work has been given little notice and justifiably so: in spite of his vehement condemnation of patriarchal violence against women, Adorno's image of femininity is more conformist than progressive. In addition, in his analyses of dominance he neglects gender orders” (Becker-Schmidt, 1999:105).

Many authors have noted Habermas’ theoretical neglect of gender, including Fraser (1985), Fleming (1997), Meehan (1995). It is noteworthy that apart from a

brief comment on feminism as a “new social movement” Habermas did not address gender *at all* within his extensive *Theory of Communicative Action* (Fraser, 1985:98). I do find it baffling that a modern-day, universalistic philosopher like Habermas who strongly critiqued leaders in the political and academic fields during post-WWII Germany for their “collective and calculated refusal to acknowledge and break with the past” (Finlayson, 2005:xiv) has still not argued more explicitly for gender equality. I note the concerns of Flemings, who said:

“...from my feminist perspective, Habermas’s theory is not Universalist enough. I contend rather that universalism has to include a vision of gender quality...his theory of communicative action does not allow for the articulation of such a vision. How can he suggest that feminism belongs to the grand ‘universalistic’ tradition of bourgeois-socialist liberation movements and still maintain that feminism is a ‘new’ social movement reflecting late-twentieth-century particularistic aspirations? ...Why does he continue to develop a moral theory that denies moral status to issues of gender, despite concerns raised by feminist theorists? Why does he view his class-based model of the public sphere of modernity, which he worked out over three decades ago, as basically correct, despite the evidence for the differential basis of women’s exclusion from the public sphere?” (Fleming, 1997:1-2).

Other feminist theorists also critique Habermas’ perceived indifference to women in his Communicative Action Theory noting that his disregard of gender issues was so fundamentally embedded in his theory as to relegate them to being androcentric (Fraser, 1985). Other researchers suggest profound changes would need to be made to the theory if it was to reflect modern women’s interests (Benhabib & Cornell, 1995). Commentary on his concept of a “communication community” indicates it is plagued with limitations and consequently has little to contribute to feminist discourse (Braaten, 1995:139). Habermas’ (perceived) slighting of women and unresponsiveness to his gender neutral stance created a distrust of his work within the feminist community.

Feminist theorists note that in other areas of critique of his work he has responded and been in “constant contact with his critics and frequently reformulates his ideas in response to them” (Finlayson, 2005:xviii).

“[Habermas]...ignores substantive differences imposed by class, race, or gender that may affect a speaker’s knowledge of the facts of the capacity to assert herself or command the attention of others” (Narayan, 2004:261). Most disconcerting about Habermas’ failure to respond to feminist critics is the impression this creates, relating back to control issues and power differentials. I see Habermas’ silence as a form of marginalisation, because if human nature is to transform and for change to occur, there is an essential requirement for critical self-reflection. Without this self-awareness, I believe one is colluding with society in reinforcing inequality.

With Habermas’ work as the one of the foundational theories shaping CST, I consider the progression of CST as an emancipatory practice with curiosity and some unease. Both my curiosity and unease are framed by CST’s representation in the systems field as being the most advanced for dealing with complex issues that address pluralism (methodologies, methods, voices, values, etc.) and power inequities, with only a mere whisper in the literature and practice on issues of gender equality. How appropriate a methodology is CST to deal with complex human dynamics and improvement if it is predisposed to gender blindness?

3.4 First Generation CST

In its early practice, CST theorists suggested five fundamental commitments, subsequently reduced to three: critical awareness, improvement and methodological pluralism (Flood & Jackson, 1991d; Jackson, 1991a; Schechter, 1991). Initially, the five commitments were: “critical awareness, social awareness, complementary use of systems methodologies in practice, complementarianism at the theoretical level, dedicated to human emancipation”

(Jackson, 1991a:139-141). During the first generation of CST two important publications shaped the debates.

3.4.1 Critical Systems Heuristics

Ulrich's social planning theory, Critical Systems Heuristics (CSH), the only explicitly emancipatory critical theory in the systems field to date, initiated a profound theoretical debate on how to undertake boundary analysis and embed emancipatory principles within systems thinking. Ulrich himself was prepared to accept that CSH (it insights might take time for the broader community of citizens, social planners and systems designers to fully digest. That notwithstanding, Ulrich positioned CSH as: "the heuristic support they [planners and citizens alike] need for confronting the problem of practical reason *in practice* rather than in theory" (1983:15, emphasis original). This notable social theory (some say methodology, but Ulrich was explicit that it is more than this, and I believe it is both) constructed a practical application based on Kant's theoretical writings introduced in the 1781 *Critique of Pure Reason* (Kant, 1998) and 1788 *Practical Reason* (Kant, 1956). Along with Kant, Ulrich borrowed from other 20th century theorists such as Popper's (1959) stance stating science and other knowledge could and should be rationally criticized; Habermas' Theory of Communicative Action (Habermas, 1984a; 1984b); and Churchman's work on the ethics of identifying system boundaries (Churchman, 1970; 1979).

Independently, the three components represented in the title CSH; critical, system and heuristics, each represent key directives within Ulrich's theory, suggesting that when they are aggregated into a systemic intervention, there arises the potential for practitioners to uncover hidden marginalisation and emancipate not only those involved in the intervention, but also those who might be affected (Ulrich, 1983). Ulrich's use of 'critical' in his 'critical theory' similar to was influenced by the Frankfurt School's work to "to liberate human

beings from the circumstances that enslave them” (Horkheimer, 1972:244), discussed earlier in chapter, section 3.3.

The second component of CSH was called ‘system’, which relies on Kant’s holistic definition as “the totality of relevant conditions on which theoretical or practical judgements depend, including basic metaphysical, ethical, political and ideological *a priori* judgements”(Ulrich, 1983:21). Even with system scientists calling into question the ability to ‘know a whole system’ (being able to ‘see’ the entirety of any problem context), the intent here was to better articulate a more comprehensive view of a given problem by reflecting on its interrelations, while acknowledging a ‘God’s eye’ view as never being possible (Midgley, 2000).

Finally, the definition for heuristic in CSH contributes four elements to Ulrich’s theory. First, it is intended to assist in discovering questions to any problem and in uncovering knowledge without guaranteeing solutions. Second, it implies to “teach discovering”, admitting that education was the most important concern of his work (Ulrich, 1983:21-23). Third, it “serves to discover deception” seen as a “critical task” because the planner needs to guard against sources of deception (Ulrich, 1983:21-23). Finally, the fourth heuristic is “what a theoretical approach is not”, suggesting that the effort needed to be both critical and practical, not merely a theoretical endeavour (Ulrich, 1983:21-23).

From a practical standpoint, and where I might argue CSH is also a methodology, Ulrich devised a series of questions (See Table 3.2 below) to be considered below when considering a problem context. Ulrich proposed a set of twelve boundary questions for planners, considering both “the involved” and “the affected” to use as a “check-list...by means of these questions, both the involved and the affected can question a design’s normative content and challenge the underlying ‘boundary judgements’” (Ulrich, 1989:82). Ulrich’s method of boundary critique/judgements uses two different lenses, “what is the case” presently and “what ought to be” the case moving forward. Ulrich

offered four categories that influenced the offered boundary questions as a means to guide the reflection. First, were the “sources of motivation” seeking to identify the beneficiaries, their purpose for being involved and what measurement is/ought to be used to gauge success. Second, were the “sources of control” looking for who the decision makers were or who might have the power, what resources they had or ought to have control over and what decisions were outside of their control. The third set of questions were the “sources of knowledge”, identifying the experts providing expertise and potential agreements for implementation. The fourth group of questions, called by Ulrich the “sources of legitimacy”, looked at those people or groups that might be affected by the intervention, with the aim of identifying representative voices that might be affected negatively; what opportunities there were for those impacted to reflect on the problem context and what “space” was available to help resolve the “reconciliation of the different worldviews”(Ulrich & Reynolds, 2010:244).

Table 3-3-1 Boundary Categories and Questions of Critical Systems Heuristics
(Adapted from Ulrich and Reynolds, 2010: p.244)

Critical Systems Heuristics				
	Sources of Influence	Social Roles (Stakeholders)	Specific Concerns (Stakes)	Key Problems (Stakeholder issues)
THE INVOLVED	<i>Sources of motivation</i>	1. BENEFICIARY Who ought to be/ is the intended beneficiary of the system?	2. PURPOSE What ought to be/is the purpose of the system?	3. MEASURE OF IMPROVEMENT What ought to be/is the measure of success?
	<i>Sources of Control</i>	6. DECISION MAKERS Who ought to be /is in control of the conditions of the success of the system?	7. RESOURCES What conditions of success ought to be/are under the control of the system?	8. DECISION ENVIRONMENT What conditions of success ought to be/are outside the control of the decision makers?
	<i>Sources of Knowledge</i>	11. EXPERT Who ought to	12. EXPERTISE What ought to	13. GUARANTOR What ought to

		be/ is providing relevant knowledge and skills for system?	be/are relevant new knowledge and skills for the system?	be/are regarded as assurances of successful implementation?
THE AFFECTED	<i>Sources of Legitimacy</i>	16. WITNESS Who ought to be/is representing the interest of those negatively affected by but not involved with systems?	17. EMANICIPATION What ought to be/are the opportunities for the interests of those negatively affected to have expression and freedom from the world view of the systems?	18. WORLDVIEW What space ought to be/is available for reconciling differing world views regarding the systems among those involved and affected?

There is little doubt that Ulrich’s influential CSH work within CST brought to the forefront the issue of inclusion and marginalisation. The work provided an impetus for deep theoretical discussion and also created a boundary analysis tool (i.e. check-list) for practitioners and planners to use. Ulrich did not believe that CSH was limited to only solving problems where power differentials were present (an interpretation offered by Jackson, 1988). Midgley (1997a) identified an inherent weakness of CSH by aptly noting that when coercion needs mitigation, there would be a prerequisite of an ‘open’ (built on trust) environment to host unrestricted communication between those in power and those subordinated. Midgley further points out that, within a coercive relationship, “closure of debate” has already occurred, ensuring no further debate or communication is possible. According to Midgley (1997a:55), what remains is “political action and campaigning” in tandem with other strategies to bring about change.

Although I concur with Midgley’s observations about the limitations of CSH and his call for political action, I contend there is another major source of uncertainty. For me political action suggests that those involved with systemic interventions be they an individual, a group, or organisational levels need to have enough agency to advocate for their beliefs, which is not always the case.

This source of uncertainty is one of deeply engrained, known or unknown, gender biases held by planners/practitioners which cannot be resolved solely through the suggested campaigning (Elson, 1995b). Midgley's suggestion overlooks much of the historical research conducted by theorists and practitioners within gender and development projects who have spent decades engaging in political action and campaigning for gender equality in more developed and emerging countries with appallingly sluggish results (Derbyshire, 2002; Sweetman, 2012).

3.4.2 The System of Systems Methodologies

The second key publication launching CST, following Ulrich (1983), was Jackson and Keys' (1984) article, offering a pluralist matrix called the 'System of Systems Methodologies' (SoSM), later referred to by Jackson as "enhanced OR [operational research]" (Jackson, 1988:715). The matrix represented an important attempt to determine which methodological approach were superior and the authors endeavour to help practitioners consider the different assumptions inherent in different methodologies to address a range of problem contexts.

Simplifying greatly, the SoSM (See Table 3.2 below) is categorised by two axes: the vertical one depicts a continuum of 'systems' (problem complexity) dimensions from 'simple' or 'mechanical' (rather easy problems) to 'complex' or 'systemic' (rather difficult problems). The horizontal axis categorises the perceived nature of the relationships between the participants. The first was 'unitary' in which participants agreed on common goals and made decisions for the system based on those goals. In the next column was 'pluralistic' wherein participants could not agree on common goals and were making decisions for the system using different objectives; however, they were still able to participate in open communication. The last column was named 'coercive' wherein there were fundamental differences but participants were still obliged to work together overshadowed by power relationships (Jackson & Keys, 1984;

Jackson, 1988). From Jackson’s perspective, where coercion existed, the use of systems approaches such as operational research, cybernetics and soft systems merely reinforced the status quo of existing power differentials and resulted in an ‘enforced’ implementation (Jackson, 1988:721).

Table 3-2 System of Systems Methodologies (Jackson and Keys, 1987; Jackson, 1988)

System of Systems Methodologies			
	Unitary	Pluralist	Coercive
Mechanical	Mechanical- Unitary	Mechanical- Pluralist	Mechanical- Coercive
Systemic	Systemic- Unitary	Systemic- Pluralist	Systemic- Coercive

The intent of the grid was not to pre-define the assignment of methodological solutions to problems, but rather to guide practitioners, in designing interventions, to consider the strengths and weaknesses of different methodologies. Further, it urged practitioners to consider how the different methodologies might ‘complement’ each other based on the systems context, thus a ‘pluralistic’ approach (Jackson, 1990). Taking a pluralist view also allowed practitioners to break from the traditional practice of methodological isolationism in which one used *either* a hard (positivist) *or* a soft (interpretive) systems approach, but certainly not *both* (Midgley, 1989a). Flood and Jackson (1991b) argued that ‘hard’ systems approaches could support ‘technical’ projects, where the objectives are uncontroversial. Soft methodologies could support projects where people have different but potentially reconcilable perspectives. ‘Emancipatory’ methodologies were best suited to situations where ‘common interests’ do not exist and coercion is a possibility.

According to Midgley (1989a), although the SoSM sought to liberate, systems thinking from an *either/or* decision methodology use, the paradigmatic skirmish was not avoided merely by embracing pluralism. Midgley (1989a) pointed out the anomaly that was represented by the mere presence of pluralism, which requires one to subsume a world view such as “the world is directly knowable”

(positivist) or the “world is not directly knowable” (227-228) (interpretive) within a third (pluralist) philosophy: neither of the first two paradigms can accept this. As Midgley (1989a) explains:

“It is actually quite easy to demonstrate that the world views of the hard (positivist) and soft (interpretive) paradigms contain assumptions that make them incompatible. To give an example, a scientist steeped in the positivist tradition who believes that each new theory represents a closer approximation to the “truth” than its predecessor, and who does not subscribe to the view that the researcher cannot help but influence the research (either through interpretation, direct action, or indirect influence), will be unable to accept the practice of interpretive methodologies (however context-linked) because these involve intervention in the situation under analysis which to a positivist will always be viewed as an obstacle to discovery of the truth rather than part of it. Similarly an interpretive thinker will never be able to accept the notion of a single truth that must be worked toward, because the interpretive paradigm assumes the real world to be unknowable and hence perceptions of it become the stuff of analysis...For either paradigm to accept the practice of the other, the assumptions of both would have to be harmonized. In other words, pluralists do actually require the adherents of the approaches subsumed to alter their world views, so pluralism (and hence critical systems) must in reality be subsumptive and cannot be seen as either extraparadigmatic or existing outside a world view” (227).

Essentially, Midgley (1989a) felt that critical systems’ embracement of pluralism was a *new* worldview and was not genuinely meta-paradigmatic (as Flood, 1989 tried to claim) because it differed from the positivistic and interpretive perspectives by not “accepting existing methodologies in their original forms” but allowing for “change and/or recombine[ing] them (through methodological partitioning) in order to achieve our emancipatory goals” (Midgley, 1989a:229, emphasis added).

A few years later, other constraints were documented in the way that the SoSM was utilised in practice (Banathy, 1984; 1987; 1988; Keys, 1988). These critiques or “essentially functionalist, interpretations” were condemned by Jackson (1990:657) as being “unreflective interpretations” (1990:666). One objection that Jackson noted was Banathy’s analysis of a system by building a model using a narrow set of ‘values and preferences’ to describe a problem situation and then comparing the models to “test for pluralism” and then assigning a degree of complexity (e.g. mechanical- pluralist, systemic- pluralist) (Jackson, 1990). A concern noted by Jackson (1990) was whether considering the diversity of real-world problem situations, it would be informative and therefore productive, to reduce the rich variety of real-world problem situations to only four or five classifications of complexity (Jackson, 1990). Secondly, again referring to the large problem contexts, would individuals or groups be able to reach some agreement as to what type of problem-context they were actually facing? (Jackson, 1990). This was why, according to Midgley (2000), the act of diagnosing context always has to be approached as if it is potentially complex, pluralistic and contains the presence of coercion. This was precisely why a boundary critique needed to be reflected on before and throughout any intervention.

Also, with regard to methodological pluralism, Midgley and Floyd (1988) and Midgley (1990; 2000) were critical of the SoSM for several reasons, one of the most important being that it tended to encourage selection of pre-determined methodologies rather than the mixing of methods and the creation of custom-made approaches as opposed to being responsive to the problem situation and emergent properties. Midgley (1990) argued that most situations requiring intervention were so multi-faceted that *either/or* choices between methodologies were inappropriate, and a “creative design of methods” was needed instead, emphasising the use of ‘methods’, not methodologies. Midgley (2000) advocated the on-going development of a researcher’s own systemic

intervention methodology (singular), or research practice, which could support the selection or design of multiple methods (plural) based on their relevance to particular projects.

In his 2000 book *Systemic Intervention: Philosophy, Methodology, and Practice*, Midgley presented three detailed case studies where no 'standard' first or second wave systems methodology could have delivered what was needed. But most restrictive of all, SoSM was not supportive in coercive situations, even when aligned with CSH emancipatory ideals (see section 3.4.1). In particular, SoSM froze the interpretation of the methodologies it subsumed and did not allow for addressing a wider range of problem contexts that might develop over time, making the analysis static. This reductionist¹³ approach, despite its best intentions, disallowed responsiveness to the reality of problem contexts and how they evolve through dynamic shifts (Midgley, 2000). The ethical imperative according to Midgley (2000) was to examine the nature of communication, the interpretations created, and the influence of other perspectives, with the recognition that transformation can occur through the "exchange of ideas" of "individual agents" (i.e. discrete people) (Midgley, 2000:251).

As an experienced organisation development practitioner, I appreciate the idea that situations are very often so complex that a tailored approach is required. However, as someone who is relatively new to the intricacies of systems thinking methodologies, I appreciate the framing that the SoSM provided as a starting point to consider how to mix methods. I suggest that both ideas are useful: the learning about methodology and methods that is built into the SoSM can inform the creative design of methods in particular projects (and I should note that this is how Midgley (1990) used it in practice before he abandoned it in later writings.). Although the advent of SoSM stimulated the

¹³ Theory reductionism suggests that a newer theory does not replace or incorporate the existing theory but instead 'reduces' it to more basic terms (Ney, 2016).

leveraging of multiple methodologies to meet the needs of a problem context, it still was unable to support practitioners who encountered marginalisation and conflict.

3.5 Second Generation: CST Evolves

Although CST made a profound contribution and set the stage for more flexible and inclusive intervention strategies for systems thinking practitioners and academics, there have been challenges to some of its core assertions. A blistering critique, written by Tsoukas (1992; 1993), admonished CST for using ideological arguments that were not defensible in a scientific domain. In my view, however, Tsoukas's critique was very narrow, as it stemmed from a positivist position: 'ideological premises cannot be scientifically assessed' (Tsoukas, 1992:4). In essence, Tsoukas did not take into account that a researcher can make an ideological commitment in a moment of action, and yet still remain open to reflections and dialogue on the advisability of this in future moments. From a CST perspective, reflections and dialogue need to sit alongside empirical-analytic science as means of critique (Gregory, 1992; 2000).

Tsoukas also attacked early CST authors for having a naïve understanding of power in organisations, despite the avowed intent of Ulrich, Flood, Jackson and others to address this issue. He asserted that the authors overly relied on Habermasian theory, which assumed power relations could be neutralised through democratic and rational dialogue (Tsoukas, 1992; 1993). Tsoukas said that, from the perspective of an author like Foucault, power exists in the deployment of knowledge during dialogue, so cannot be neutralised. However, some CST authors were clear in explaining that power relations could be addressed through intentional, ongoing, extensive, boundary critique (Midgley, 1992b; 1994; Ulrich, 1996; Midgley, 2000; Pinzón & Midgley, 2000; Yolles, 2001):

“Questioning what seems obvious must be a constant companion in these tasks. We should always remain aware

that we live within a dynamic web of boundaries, marginalisations, ethical conflicts and value judgements, and we should never be tempted to regard any framework or model as an absolute" (Pinzón & Midgley, 2000:509).

Indeed, Flood (1990b) and Midgley (1997a) made explicit cases for the compatibility of CST with Foucault's perspective on power. The problem, perhaps, was that the ideas were not taken up in Flood and Jackson's (1991a; 1991d; 1991e) work, which embraced a relatively naïve view of power, and indeed it confined the use of CSH (the only expression of boundary critique allowed in their framework) to simple-coercive situations. Ulrich (1993) and Midgley (1996) were both emphatic that boundary critique needed to be seen as an essential starting point for all systemic interventions (see definition page xiii), (not just ones undertaken in simple-coercive contexts), otherwise power relations and their effects could remain invisible.

Oliga's (1990) work scratched the surface with his original emancipatory social theory for CST, where he described the profound influence that any particular "social control" resulting from "power-ideology" had on an organisation by being the "product of conscious actions of human beings as makers or victims of history" (Oliga, 1990:46):

"...organisational power relations and the functioning of ideologies from the point of view of those "under control". Thus, the "powerless" obey, thereby contributing to systems stability tendencies, or resist and struggle, thereby contributing to systems change tendencies, all depending upon their perception of the degree of effectiveness of an organisation's power-ideology matrix" (Oliga, 1990:45).

The critiques mentioned above (and others) gathered pace during the mid-1990s and led to a re-envisioning of CST, challenging the work of Flood and Jackson (1991e) in particular and to a lesser extent Ulrich (1983). The previous theories, although not completely disregarded, were built on with new

'thinking' continually shaping and changing the 'commitments' led by critical reflections and practices. Flood (1990a) offered his Liberating Systems Theory as a "sociological paradigm", asserting it included "methodological, epistemological, ontological and ideological views" which sought to address subjugation and paved a pathway to emancipation and therefore liberation (Flood, 1990b:50). A subsequent article by Flood and Jackson (1991e:200) once again affirmed the central emancipatory mission within CST seeking "to achieve for all individuals, working through organisations and in society the maximum development of their potential". The "practical face" of their theory demanded from their perspective that equal attention be given to "human well-being" as to "technical concerns" (based on Habermas' work) which would create an atmosphere of heightened awareness about potential coercion (Flood & Jackson, 1991e).

3.6 Second Generation: CST Adapts

An important book that was edited by Flood and Romm (1996), with a chapter by Midgley (1996), outlined six criticisms and how a new approach to CST could address them. A 'second generation' of CST was born, including fresh thinking from its first generation writers alongside the works of new entrants into the research community. Significant writers in this second generation included Gregory (1996; 2000), Flood and Romm (1996), Tackett and White (2000), and Midgley (2000). However, the contribution that received the most attention in the literature, and has achieved greatest longevity, was Midgley's (2000) 'Systemic Intervention'.

3.6.1 Systemic Intervention

The distinguishing characteristic of a systemic intervention is the symbiotic partnership between boundary critique and methodological pluralism, which were in tension in earlier CST work. Ulrich (1993) advocated boundary critique and distanced himself from other systems methodologies, while Flood and

Jackson (1993) tried to confine boundary critique to a limited range of contexts in their advocacy of a wider plurality of approaches. Midgley (2000) argued that boundary critique on its own could provide interesting information about power relationships, but did not necessarily lead to change. Conversely, using action-based systems methods without a thorough boundary analysis could provide a superficial picture of the situation resulting in ineffective or problematic change (Midgley, 2000; 2006a). Each, therefore, addressed the weaknesses of the other.

Midgley (2000) introduced a new theory into the discussions of both boundary critique and methodological pluralism, highlighting a distinction between primary and secondary boundaries. For Churchman (1970) the process of identifying a boundary brought to the forefront what was to be considered pertinent at any given time during an intervention. Midgley (2011:5) declared two assumptions in regard to most systems approaches: first, "That everything in the universe is directly or indirectly connected to everything else", and second "We cannot have a 'God's eye view' of this interconnectedness: our understandings in any situation are inevitably limited". It is assumptions and the limitations to understanding that necessitate the identification of constraints within a systems approach either explicitly or implicitly (Churchman, 1970; Ulrich, 1983; Midgley & Pinzón, 2011).

If we acknowledge the primacy of boundary analysis, then how a knowledge generating system and the world it belongs to is therefore defined by the same "process of making boundary judgements" (Midgley, 2011:5). According to Midgley (2000:79): "Process philosophy involves identifying a process that is not dependent on the further identification of a single type of system giving rise to that process" which suggests that "agreeing that the process of making boundary judgments is analytically prime, rather than a particular kind of knowledge generating system, then *subjects come to be defined in exactly the same way as objects – by a boundary judgement*"(2000:79, emphasis original).

Boundary judgements are also central to Midgley’s notion of a process philosophy¹⁴, an iterative reflective process which uses two primary boundaries called “first order” (looking outward) and “second order” (looking back) (Midgley, 2000). Midgley (2000:80-81) claims: “it is possible to make a variety of boundary judgements when looking ‘outward’ towards the world, and a variety of judgements when looking ‘back’ at the knowledge generating systems which produce these ‘outward’ judgements.

For example: the process of boundary critique can generate knowledge by engendering multiple perspectives as stakeholders seek to establish the limitations of a problem. One group may decide on a narrow focus of inquiry (termed a “primary” boundary). A second group may then argue for a wider “secondary” boundary that encompassed the primary. The resulting area between the primary and secondary boundaries is “marginalised”, and whether or not marginalised elements are included in the remit of an intervention becomes the focus of stakeholder conflict (Midgley, 1992b; Midgley et al., 1998; Midgley, 2000). This understanding of marginalisation is represented in Figure 3.1 below.

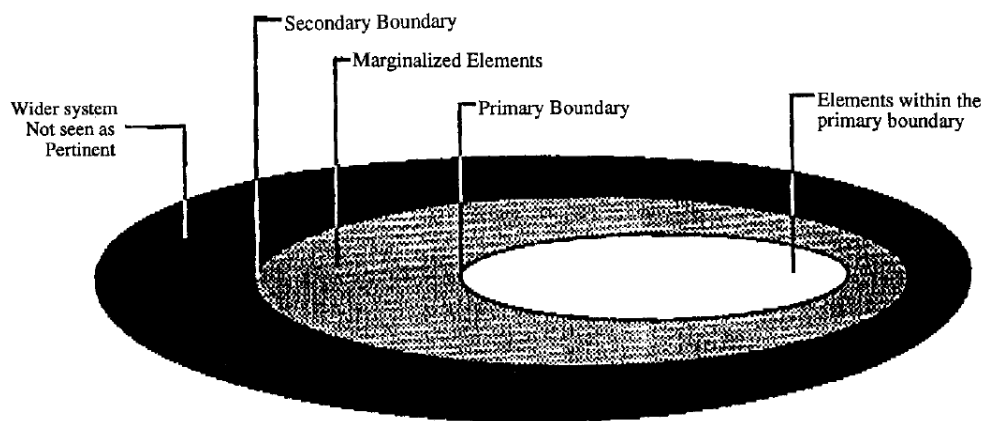


Figure 3-1 - Marginalisation
(Midgley, 1992b; Midgley, 2000)

¹⁴ Midgley’s process philosophy within systems thinking is not be confused with other uses of the same term by Bergson (1911), Pols (1967), Capek (1971), Leclerc (1972), Mathews (1991), Gare (1996).

Midgley's theory of boundary critique then provided more guidance on how to understand marginalisation, borrowing terms from anthropology. He said that marginalised people and issues are often assigned a 'sacred' (valued) or a 'profane' (devalued) status by stakeholders (Midgley, 1992b):

“We see one ethic arising from within the primary boundary and another from within the secondary. These come into conflict—a conflict which can be dealt with only by making one or the other of the two boundaries dominant. This dominance is achieved by making elements in the margin (between the primary and the secondary boundaries) either sacred or profane. The whole process is symbolically expressed in ritual, which, in turn, helps to support the total system. Here, then, we see some of the complexities of relationships” (Midgley, 1992b:11-12). (Figure 3.2 below)

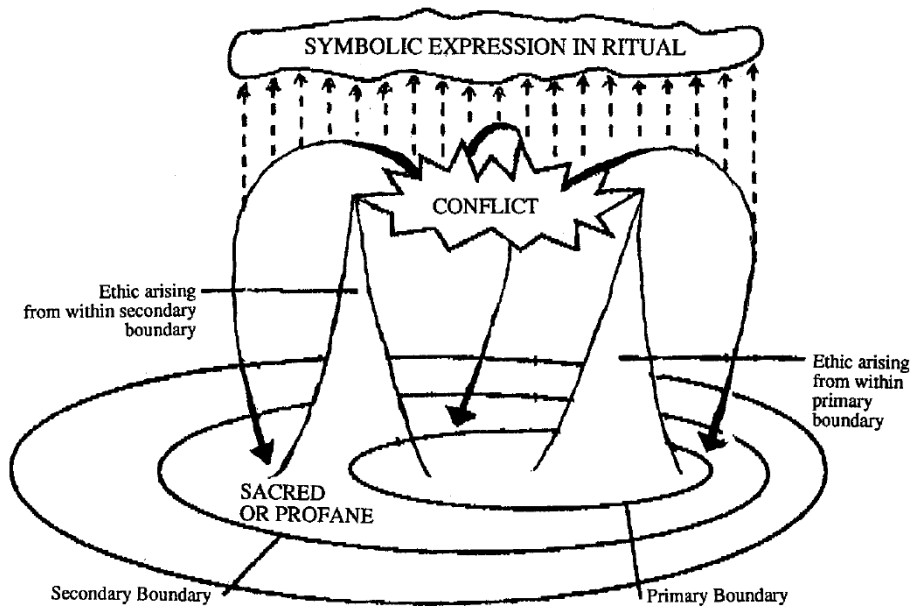


Figure 3-2 - Margins, Ethics, Sacredness, Profanity and Ritual (Midgley, 1992b, 2000)

Another significant shift in systemic intervention was the term “improvement” instead of “emancipation”. There were two reasons for this

shift. First, Midgley (1996) was concerned that there was an implicit theory of humankind's "march to progress" within the Habermasian approach to emancipation adopted by early CST writers. Midgley (1996) argued that this was not credible in a world where one person's "progress" may be perceived as a setback by others. Second, Midgley (2000) argued that "improvement" was a wider term, and emancipation was just one form of improvement. Other forms of improvement (understood critically, taking account of multiple perspectives) were legitimate foci for intervention too.

The idea of a systemic intervention, even if it has not been explicitly identified as such, continues to be applied, and one could even say embraced, in other research fields such as evaluation and more recently, evaluation in global development. Evaluation is the quantitative and/or qualitative process of building evidence to measure or monitor claims about the value of policies, programmes and strategies (Schwandt et al., 2016). The evaluation and systems fields share similar theoretical and practitioner dynamics developments over the past five decades, as well as drawing on similar philosophical, sociological and scientific research shaping their current roles in interventions (Williams & Imam, 2007).

According to Williams and Imam (2007) evaluators can most benefit from systems thinking through the consideration of three themes: perspectives, boundaries and entangled systems. Perspectives refers to acknowledging that everyone is shaped by their own life experiences, cultures, values and therefore will have different 'world views' in identifying problem contexts and ways of taking action (Williams & Imam, 2007; Reynolds & Williams, 2012). For the intervention to be systemic, however, the perspectives need to look not only at the different pieces of problem and knowledge generating systems, but also at how these components are interrelated (Williams & Imam, 2007; Reynolds & Williams, 2012). Boundaries, as discussed earlier in this chapter, are value-laden and can be "physical, personal, or social constructs" (Stephens, 2013:32) and

therefore influence what or who will be part of the intervention and a central activity within a systemic approach (Williams & Iman, 2007). The third systemic idea endorsed by Williams and Iman (2007) for evaluators is that of entangled systems urging critical reflection by looking “inside, outside, beside, and between the readily identified systems boundary” (Williams & Imam, 2007:6; Reynolds & Williams, 2012). As a development practitioner myself, I am seeing an increased interest in how to use systems thinking in development projects and their requisite monitoring and evaluation efforts to create a more equitable world. Incorporation of systems interventions in international development efforts and the associated monitoring and evaluation of these efforts are increasing driven by practitioners, evaluators, academics and donor agencies seeking to better understand the complexity (e.g. stakeholders, social and political landscapes, natural disasters, conflicts) that is represented in these projects (Befani et al., 2015). Yet there is more work yet to be done and challenges ahead in the partnering of these potentially symbiotic projects.

Although critiques of systemic intervention were sparse, there were some. Georgiou (2001) and Mingers (2006; 2014) argued that placing boundary critique in such a pivotal position in an intervention does not recognise the prior existence of the agents giving rise to those boundaries. A self-identified critical realist, Burton (2003:332), was resistant to adopting positions that set down different boundaries and therefore questioned the ability of Midgley’s process philosophy¹⁵ to establish new boundaries for the purposes of casting light on philosophical debates. Lockett (2003) in his work in designing a district health system in post-apartheid South Africa, noted that the lack of “objective criteria” (152) to guide the identification of stakeholders, or what Checkland (1981a) referred to as “problem owners”, could lead to unavoidable value

¹⁵ Process philosophy according to Midgley (2000, p.79) suggests regarding “the process of making boundary judgements as analytically prime, rather than a particular kind of knowledge generating system, then subjects come to be defined in exactly the same way as objects by a boundary judgement.”

judgements as part of the selection process. Some early systems theorists characterised the primary source of a knowledge system with physical metaphors. Bateson (1972:34) referred to a “circular related pathway”, Maturana (1988a:25; 1988b) an “autopoietic organism”, and von Bertalanffy (1968) a “biologically-situated observation. While I agree with Luckett (2003) and Checkland (1981a) that objective criteria are necessary to identify the boundaries of an intervention using a primary sources from within the knowledge generating systems, the global, hierarchal nature of my intervention meant there were multiple knowledge systems and stakeholders that may have overlapping perspectives or merely parallel perspectives without intersections or agreements about what the source of gender equality was within their related organisational systems (Midgley, 2011). From a practitioner point of view, my experience showed time and again, that new knowledge was often created through the process of inquiry, debate, adaptation and therefore emergent processes.

Secondly, Burton felt that the systems domain did not look broadly enough at methods, suggesting there were a “small set of methods deriving from a few writer/practitioners” (Burton, 2003:332). This aligns with my concerns about the systems field in general, its theorists having built their understanding about emancipation on a very androcentric reinforcing theorising loop, often excluding or neglecting women. A third critique of systemic intervention was introduced by Bausch (2003:122), bringing into question Midgley’s primacy of theoretical pluralism and “sidestepping” or neglecting a “cumulative view of knowledge”, which he claimed closed the debate in scientific circles.

My own perspective is that while Midgley is right in theory, in arguing that emancipation is just one form of improvement, in practice this shift in terminology within CST had the effect of closing off the previously very lively discussion in the systems community about what constitutes an emancipatory intervention. I also see emancipation about a form of liberation both in the

abstract and as a structural enfranchisement. Improvement on the surface such as new policies written and ratified by organisations, is potential improvement, but only if a society's culture experiences a 'freedom of the mind' to authentically support, advocate and implement the new policies. From a gender equality perspective, the debate about the loss of emancipation or the commitment to improvement is a more profound one than a mere epistemological nuance: it is a third leg of a stool for CST.

3.7 CST and Global Development

Global development, with all its societal, political and economic complexities, would benefit from a systemic approach to help untangle the 'whole' and its interrelated relationships, rather than breaking it into component parts and looking at each in isolation (Burns & Worsley, 2015). For example, it is not possible to look at gender equality without considering the complexity represented within it, such as distribution of gendered workloads, education, access to economic resources, leadership, health, well-being, etc. which are discussed in more depth in Chapter Four (Pearce, 1978; Chant, 2006; Medeiros & Costa, 2012). More common within systems literature, yet still sparse, are examples of CST being applied in global development contexts, although most do not specifically analyse gender inequality.

Taket and White (1997) in their social policy work in Belize and London acknowledged that "pluralist strategies for evaluation helped us to respond to heterogeneity, variety and dynamism" (p.109) and noted that it is an evaluator's responsibility to be aware when:

"...views are reinforced by boundaries socially and linguistically constituted which act to oppress particular groups, for example those of race or ethnicity, then the evaluators need to separate these out in the course of the intervention and explicitly challenge any introduction of them into the process to reinforce the oppression."(Taket & White, 1997:109).

Reynolds (1998) in his work on the weak impact of natural resource use appraisal projects to alleviate rural poverty in Botswana, mentioned women, the poor and ethnic minorities as part of “the affected”. He did not, however, provide much guidance on how to “unfold” an appraisal intervention in response to those marginalised groups. Reynolds (2014) did address ethics and equity (but not gender equality) using CST and equality-focused development evaluation. He recommended that an important component within environmental projects was the consideration of current stakeholders, but also the potential to marginalise future generations and non-human stakeholders. More recently, Romm (2015) explored the relationship between the “big four paradigms” (e.g. positivist/post positivist, interpretivist/constructivist, transformative and pragmatic), systemic approaches and the post-colonial Indigenous paradigms. She supported the study of Indigenous paradigms embracing the richness in learning that can occur when adopting the use of non-Western philosophical foundations without “subsuming” them to existing Western ones.

In an article describing the use of systemic action research to create change in complex development projects, women are included as examples within several case studies but gender equality is not part of the analysis (Burns, 2014). Most recently, a series of articles researching the role of women in development, in agriculture and in other systems have been published (Nguyen et al., 2011; Banson et al., 2014a; Banson et al., 2014b; Bosch et al., 2015; Trinh, 2015). In one of those articles, by Kwamina et al. (2015), systems thinking is used to understand women farmers’ mental models in Ghana as a way to overcome barriers to agricultural practices.

3.8 A Fork in the Road: Feminist Systems Thinking

CST’s call for emancipation within theory and practice that began in the late 1980s and is still thriving today, is striking. CST was part of a much broader

movement in the social sciences towards the end of the 20th century that culminated in a whole series of sociological 'turns'. Overlapping debates seeking deliverance from oppressive forces were occurring within feminist theory against the vociferous backdrop in the U.S.A. opposition of the Vietnam War, the Civil Rights Movement and Equal Rights Amendments. Similar cries were also being heard in the U.K. and Europe; all clamouring for equality not only for women, but also other social groups based on race, class, ethnicity, etc. What is troubling is that these debates go virtually unmentioned within the systems literature (Baumgardner & Richards, 2003).

The most extensive representation of CST contributions considering emancipatory practices is in the Community Operational Research (COR) movement (mainly in the U.K. and U.S.A.). This movement moved from working mostly with positivist leaning traditional businesses, such as the military or governments, to partner with clients from trade groups, cooperatives and third sector (volunteer) entities (Rosenhead, 1987; Midgley & Ochoa-Arias, 2004; Johnson, 2012). Additionally, a range of systemic interventions with emancipatory intents and pluralistic designs in emerging economies or with indigenous populations can also be found, for example in Botswana (Reynolds, 1998), Colombia (Pinzón Salcedo, 2002), New Zealand (Midgley et al., 2007), Vietnam (Nguyen et al., 2011; Trinh, 2015) and Ghana (Banson et al., 2014b). However, none of these interventions explicitly looked at the role of historical inclusion/exclusion practices and the extant gender inequality still in play through most social systems today.

Stephens (2013a) in her influential *Feminist Systems Thinking* work is the first person to address gender in systems literature in a substantial way (Section 3.9). Building on her work, I looked for other literature that might provide some guidance.

3.8.1 Gender as a Topic within Systems Thinking

My pursuit of research that contains intersections of 'gender' and 'systems sciences' has surfaced ten relevant authors over the past 22 years. Forrest (1993) took a very critical perspective in her field of industrial relations: "...if it [industrial relations] is not entirely oblivious to the presence of women, then it is certainly unaware that their presence makes much of a difference" (1). A particularly relevant observation from Forrest's perspective, and also one that can inform CST, is the need to use gender as part of analytical boundary critique:

"It is not uncommon for researchers to overlook women entirely by choosing data sets that include only men or by failing to report their results disaggregated by sex...We must come to recognize the value of what women do, to understand the needs of working women, and the priorities which they set for themselves. At the same time, we must begin to address the reality that men have used their superior power to order the workplace in accordance with their needs and priorities...an understanding of gender relations as power relations is drawn into the analytical framework..."(Forrest, 1993:13).

Taket and White (1993) acknowledged gendered language within social systems, calling for everyone to "change the way we act" (p.879) by examining the pattern of using androcentric language to delineate differences between hard and soft operational research such as "hard/soft, rational/intuitive, intelligible/sensitive" (Taket, 1994b; 1994a). From this feminist's perspective, their rallying cry was short-circuited, however, because they stepped away from political action stating, "We have no position and support no party line" (Taket & White, 1993:879). Even if Taket and White supported the viewpoint that paradigmatic change must come from within, their impassiveness on the subject seems like a missed opportunity for advocacy, considering that they are

respected members of the field. Taket (1994b; 1994a; 1995; 2008) turned for guidance to alternative fields, such as feminism or non-Western philosophers, when grappling with ethical boundaries. Her search for a “code of ethics” while working with operational research clients, was not answered by systems theorists or “malestream” and Eurocentric philosophers, sending her beyond her familiar boundaries of wisdom. She later said, “The effect of the constant use of 'himself', 'man', 'his', 'he' is to offer and reinforce a view of the world as male, and I think it deserves to be pointed out as selective and exclusionary”(Taket, 1994a:969).

Taket has been criticized lightly by some and in a more barbed manner by others for this stance. Bowen (1994) advances a clear societal and class privilege bravado, declaring that there is no need for a “prescribed code of ethics” (965). He notes that in his 40 years of working for the military (which I would argue epitomises male privilege) he was “rarely troubled as to the propriety” of his work. Gass’ (1994) response to Taket’s reach beyond mainstream philosophy for ethical wisdom is that, although the 1971 operational research ethical guidelines warrant updating, there is still a responsibility by individuals or consultants to “develop ethical standards, try to work within the social and moral order, and try to do no harm” (966). He closed his critique with a biblical quotation: “being the universal, all-purpose code of ethics that Taket is looking for: whatsoever ye would that men (sic) should do to you, do ye even so to them: for this is the law and the prophets. Matthew, 7.12” (Gass, 1994:966).

Gass’ critique was rigid, defensive and strove to negate Taket’s “naïve” interest in ethical guidelines beyond the androcentric norm. Midgley (1995) entered the exchange, suggesting a “focus on the *process* of critical self-reflection” (547-548, emphasis original), citing both Ulrich’s CSH work (1983; 1987) on ethical planning and Gregory’s (1992; 1994) on the use of critical self-reflection, ideology critique, empirical research and hermeneutic inquiry. Midgley welcomed ongoing debate.

In 1996, three systems theorists included aspects of gender in their work. Cohen (1996) contrasted “cultural feminist” (historically nostalgic) or “bureaucratic” (hierarchical) perspectives by volunteer staff in a women’s health clinic. Gregory (1996:55-56) introduced her “discordant pluralism” for CST, proposing that in situations where the need for ethical judgments emerges, such as in the context of abortion where there are two opposing, seemingly irreconcilable sides, the debate could include “both/and” perspectives juxtaposed in a shifting constellation of “changing elements” using a critical approach to the opposing perspectives. As Gregory noted, and this is an important element to consider for my own research, this required both sides to commit to critical appreciation of each other’s arguments, which is a normative stance that is often not present in the quest for gender equality.

Romm arguably has been the most prolific female systems theorist to date, and has touched on gender issues several times. On one occasion, Romm referenced gender issues as part of an action research project in Africa intending to stimulate change in the existing asymmetrical practices that afforded men “better access to jobs, education, land and other means of production”(1996a:256). Romm’s article on the project, however, was a reflective and theoretical piece on learnings gained within a CST context.

From a feminist perspective, Walby (2007) synthesised social and complexity theories as a way of further developing the definition of social systems to address the intersectionality of inequalities of gender, ethnicities, nations, religions, etc. Walby pointed out that it is insufficient to theorize individual inequalities as if they could be “added up”. Intersectionality used in academic scholarship and broader contexts such as health care, social justice, demographics and evaluation, looks at the complexity and ‘intersections’ of gender, ethnicity and class (Anthias, 2013). This is because through their interrelationships with each other, they are changed, rendering their study

complex. Walby also took a stand that strikes at the heart of 'old' systems thinking:

“Within each domain (economy, polity, violence, civil society), there are multiple sets of social relations (e.g. gender, class, ethnicity) (Walby, 1990; 2004; 2009). Each institutionalized domain and each set of social relations are here conceptualized as systems, not parts of systems. This avoids the rigidity of the notion of a system as made up of its parts. Systems can be over-lapping and non-nested...The attempt to theorize simultaneously multiple inequalities without a necessarily hierarchical and nested relationship between them puts pressure on the old conceptualization of system. It is stretched to breaking point” (Walby, 2007:454).

Walby then laid out a case for the adoption of complexity as a flexible theory allowing for the interrelations of each system to be studied in a parallel analysis without relying on having to reduce them to their individual parts (Walby, 2007).

3.8.2 Gender-Blind Systems Thinking: A Theoretical Debate

The discussions within CST about subjugation and emancipation have been argued at great length and depth over the past 30+ years (Ulrich, 1983; Midgley, 1997a; Jackson, 2001; Reynolds, 2014). These extensive and lively debates, involving both academics and practitioners, have created an acceptance of systems thinking methodologies and methods/tools to improve situations that involve issues of power and marginalisation (Ulrich, 1983; Midgley, 1997a; Jackson, 2001; Reynolds, 2014). Yet, I submit that the awkward scarcity of critical reflections on gender roles within these debates challenges the validity of the epistemology itself, suggesting a male-dominated 'false consciousness', or at a minimum such an abstraction of the notions of 'emancipation' and

`marginalisation' that one of the main domains to which they are relevant remains invisible.

When building theoretical and methodological written work, particularly within an academic setting, I argue there is an implied practice that verbal discourses have transpired between conforming and dissenting voices, contributing to the development of a given stance. CST contributions to definitions of `improvement', `emancipation' and `marginalisation', although valid and important, have essentially remained gender blind. Over the past 20 years, only three different authors have brought feminism explicitly into the analysis: Carter (1990), Hanson (2001), Stephens et al (2010b; 2010a) and Stephens (2012a; 2012b; 2013b; 2013a), whose positions will be reviewed in turn. The work of Stephens, however, which has influenced this research extensively, will be reviewed in greater depth in Section 3.9.

The separation in time of the above authors' works gave each theorist's piece a different philosophical, theoretical and social context. They therefore drew on different feminist discourses relevant at the time. A publication concerning women as distinct systems thinkers emerged shortly after CST began to take shape, with Carter (1990) being the first to name explicitly the gender blindness of systems science:

“My guess is that my male colleagues have not even noticed that they have created and maintain a predominantly male working environment. Although systems people practice in a liberal profession, that profession has the same male aura and ethos that are current in other, less liberal, professions such as medicine and law. Equality of opportunity is not even an agenda item, because it is widely assumed to exist already, yet members of disadvantaged groups are notable by their absence. This can be unattractive to women considering career choice or career change” (1990:566).

Carter (1990) suggested that women are culturally nurtured to be systems thinkers and habitually depend on their holistic understanding of complex interactions for problem solving. The following are just a few examples. At work, women managers tend to prioritize human-centric values alongside economic outcomes (Carter, 1990). In politics, women in the peace movement link the need for peace to safeguarding the planet as a whole for future generations (Carter, 1990). In academia, women researchers often create a more explicitly subjective relationship with their research (Carter, 1990). Multiple “essentialist’ strategies” (see below for an explanation of this term) suggested by Carter in an effort to increase the number of women systems thinkers include encouraging women to enter the field, providing more support and training once they are there, and re-examining how professional recruitment is conducted (Carter, 1990).

These “essentialist” ideas proposed by Carter reflect the dominant feminist writings in the 1980s and 1990s. In general, the main controversy at that time was whether or not women, as a gender, have shared characteristics in common. These shared characteristics unify them as a homogeneous group; therefore, these traits are ‘essential’ to their definition as a group (Marshall, 2000; Stone, 2007). For example, early feminists assumed that certain privileged women’s experiences were the norm; otherwise the exclusion from access to power could underpin the general claims of all women (Stone, 2004; 2007). From today’s vantage point, essentialism appears rather naïve, as it would appear that the only thing that *all* women have in common is their gender (Stone, 2004; 2007). Carter’s early identification of the absence of women within the systems field was a useful acknowledgement, yet the disadvantage of Carter’s recommendations for making progress in increasing the proportion of women involved in the systems community is they are not themselves systemic. The recommendations do identify specific areas for action and research; however, it is difficult to see how the process of recruiting, supporting and retaining

women professionals could be protected from the tendency of real institutional systems (such as education and science) to resist change.

A strong case for the compatibility of systems thinking and feminist ideas is made by Hanson (2001), which is reflective of both the second and third waves of feminist discourse at the time (Carter was also part of the second wave, which some sources suggest ended in the late 1980s (Mann & Huffman, 2005)). The second wave advocated a multi-racial focusing on interlocking oppressions (e.g. race, class, ethnicity, north and south economies) (Thompson, 2002). In her efforts to create pan-disciplinary research, looking for commonalities across a vast array of scholarship in a wider context, Hanson incurred resistance to her belief that there are linkages between feminism and systems science, especially her assertion that they are “compatible, even inseparable” (Hanson, 2001:546). She advocated for feminists¹⁶ (e.g. liberal, radical, Marxist, lesbian, black and post-modern) in all of their vast diversity and complexity, to embrace systems thinking tools in their struggle for a more inclusive world that rejects the marginalisation of women. Equally, Hanson recognised that systems theory is sometimes mistrusted by feminist scholars for its reliance on conservative and positivist foundations (Hanson, 2001).

One suggestion from Hanson (2001) was the adoption of a non-judgemental general systems thinking¹⁷ approach to feminism, which (because phenomena

¹⁶ Feminism has been described, and not without controversy, as having evolved through three overlapping historically progressive waves each built on, but not substituting, the critique of the previous discourses very much like the evolution of systems thinking. Briefly, the First Wave is characterized as the suffrage period where women were seeking the legal right to vote during the 19th and 20th centuries in the United States and United Kingdom. The Second Wave originated in the late 1960s focusing on social and personal rights such as equal pay, reproductive choices and mitigating the pervasive gendered double standard (Evans & Chamberlain, 2014). The Third Wave discourse gives voice to a greater diversity of women who are racially and ethnically diverse, foreground gay issues and represent a heterogeneous population (Mann & Huffman, 2005). Each of these ‘waves’ and the issues they debate are still relevant today.

¹⁷ Hanson’s use of the term ‘general systems thinking’ (GST) is idiosyncratic, involving two theoretical contradictions. First, writers on GST say that GST is a single theory, hence ‘system’, not ‘systems’. Second, the ‘general’ word is associated with neo-positivist GST, while the ‘thinking’ word is associated with soft and critical perspectives.

like inequality and marginalisation are regarded as systemic effects and not the fault of individual actors) could begin to eradicate a pattern of blame when addressing issues of equality and sexuality within feminist writings. The notion of blame, which requires the separating of parts in a system, isolating the causal factor, and attributing fault to it, would not be appropriate using general systems thinking theory. General systems thinking theory seeks to understand how the whole and its parts interact and inform each other. The notion of blame, Hanson (2001) suggested, requires two epistemological aspects, separating parts from the whole and finite linear causality, neither of which is appropriate. She also noted that future research on this topic could study the relationship between biological nature and social constructs (Hanson, 2001).

Hanson's recommendation brings me to a third researcher's work that strongly extends the connection between systems thinking and feminism, and has heavily influenced my own research and formed the foundation of my field work: Stephens (Stephens et al., 2010a; 2010b; Stephens & Liley, 2011; Stephens, 2012a; 2012b; 2013a; 2013b; 2015a).

What Stephens's work has done, is to build a practical yet analytical framework by contrasting critical systems thinking and cultural eco-feminism. The systems authors have unmasked the gaps between gendered analytical frames and systems thinking have many observations that will inform this research. Ultimately, activities such as including data disaggregated by gender (Forrest), using more gender-neutral language (Taket), looking at both sides of a discourse (Gregory), considering the intersectionalities between gender and other inequalities (Anthias, 2013) can all be helpful theoretical considerations. The more substantial gap beyond the theoretical debates from my perspective is of action-oriented systemic gendered interventions. There are multiple systems thinking practitioners (e.g. Bosch, Burns, Midgley, Reynolds) that have done more recent work within Critical Systems thinking that will be introduced

throughout the fieldwork chapters 7-9. I have chosen to include the more recent systems research in those chapters as a way to validate and support the choices I made around methods and activities used.

As a practitioner first, I find the research in this previous section helpful theoretically, but it left me wanting to know more about the authors' intentions of how to apply their ideas in the field. With Stephens' work, on how to translate her theoretical principles into methodological tools, there was a much clearer path.

3.9 Feminist Systems Thinking

Feminist Systems Thinking (Figure 3.3 below) is an emergent and recent body of work, consisting of a "political meta-theoretical framework" (Stephens et al., 2010a; 2010b; Stephens, 2012a; 2012b; 2013b; 2013a), that has contributed critically to addressing gender, marginalised voices and systems thinking. From Stephens's perspective, there is enduring work to be undertaken to emancipate marginalised voices, and women in particular:

"I consider feminism to be the most paradigm-shifting influence in the history of human-kind -- changes in our societal outlook that have brought immense benefit to women and girls everywhere and in turn our spouses, brothers and sons. Yet, as the experience of marginalised and impoverished women and girls attests, the project of emancipation from subjugation is not yet complete and liberation has been for some – far from all" (Stephens, 2013a:4).

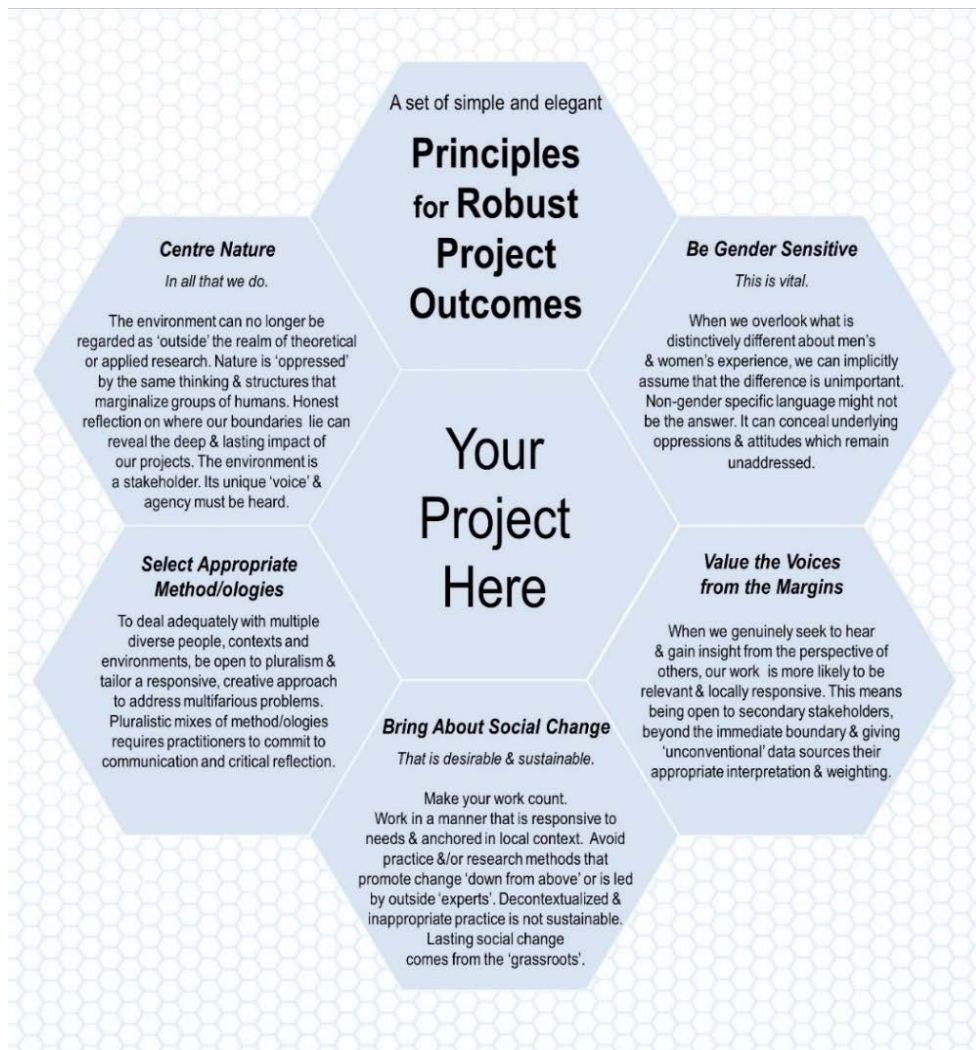


Figure 3-3 - Feminist Systems Thinking
(Stephens, 2013)

Stephens' grounded theory PhD thesis, plus her subsequent book and journal articles, compare five cultural ecofeminist publications with Midgley's (2000) comprehensive systems text, *Systemic Intervention: Philosophy, Methodology, and Practice* (systemic intervention was referred to earlier in this chapter), resulting in a synergistic eco-feminist systems thinking framework. Prior to Stephens's work, systems thinking and ecofeminism had little interaction. She noted that, even though Midgley's book did not include feminist discourses, she felt that systems and ecofeminism could learn from one another. Both had made equal progress in moving beyond positivist paradigms and challenged the persistent

divide between 'man' and 'nature' (Midgley, 2000; Stephens, 2012b). Equally, both researchers have explicitly addressed sustainable social change, an area that will be valuable in my field work in Central America, which will be discussed in Chapters 5-8). Stephens additionally saw it was possible that cultural ecofeminism could draw on the explicit process of boundary critique by incorporating systemic methodological tools (Stephens, 2013a). This new theoretical intersection supported her decision to select ecofeminism from the vast body of feminist literature encompassing over 50 sub-discourses (e.g. social feminism, black feminism, radical feminism). Ecofeminism "seeks to remind humanity that we are an integral part of the physical environment" and acknowledges the "dual oppression of women and the environment" (Stephens, 2012b:83).

Within ecofeminism there are two primary schools of thought: 'nature ecofeminists' and 'cultural ecofeminists'. Stephens narrows her boundary to the latter school by rejecting the suggested essentialist link between women and nature being both biological and psychological (Stephens, 2012b). Her reasoning suggests that cultural ecofeminism and CST have similar roots in epistemologies that seek to tackle issues of power and coercion as a response to a positivist historical landscape and rationalist means of knowing:

"Systems and structures of oppression interlock and reinforce one another, therefore, ecofeminism positions humanity as an integral part of the physical environment. Reductionism and separation of human systems from the whole physical environment perpetuate a culturally constructed oppressive dualism. The binary constructs of 'man/culture', 'woman/nature' has its ontological root in the logic of 'value-free' science and fails to account for, or give voice to members of the underside of the dualism such as women, indigenous peoples around the world, and the environment" (Stephens, 2012b:3).

Stephens's Feminist Systems Thinking framework (she does not consider it a methodology) builds on the key elements of systemic intervention (Midgley, 2000) and cultural ecofeminism. She proposes five non-hierarchical ethical principles; each will be discussed in turn.

3.9.1 Being Gender Sensitive

Similar to gender mainstreaming within GAD research, the ideal of 'gender sensitivity' or 'pay attention to specific gendered needs', Stephens (2013a) wanted to encompass the needs of both women and men throughout a project from design to evaluation. Stephens suggested a list of practitioner strategies (some adapted from McNamara, 2009) encouraging for example, participatory methodologies to lessen gender subjugation or ostracism (Stephens, 2013a). To build and maintain trust, Stephens advocated partnering with participants as 'co-researchers' as a way to validate and disseminate the findings (Stephens, 2013a:45-46).

Why is gender sensitivity so vital? Theorists and practitioners doubting the reasoning and the need for consideration of gender within a systems approach only need to review decades of feminist theory and empirical research. The essence of feminist theory and its emergence as a distinct theoretical discourse was established so women's (distinct from men's) needs, thoughts, ideals and critiques could be analytically distinct and 'visible' in intellectual debates following a history of marginalisation and almost total invisibility (Harding, 1986). What we have learned is that by merely 'adding on' women's ideas and priorities to existing debates, programmes, policies or institutions, or trying to integrate them into existing paradigms, the results end up not adequately reflecting either gender's qualities (Harding, 1986). Ultimately, it behoves humanity to critically compare and contrast women's and men's social differences within similar social conditions. At the same time, it is necessary to conduct a gender analysis disaggregating different intersections of women's class, race, ethnicity, cast, ability thus seeking to identify not only the focal

points of their oppression but also the leverage apexes to bring about lasting change (Becker-Schmidt, 1999).

It is this gender prioritization recommended in most gender equality literature that becomes less precise in Stephens' Feminist Systems Thinking. The five principles all have *equal* importance in a non-hierarchical framework, which provides the opportunity for gender to become marginalised. I believe the reason Stephens offers the opt-in or opt-out consideration on being gender sensitive is so that feminist hegemony is not imposed on others, which in a sense is ethically sound (Stephens, 2013a). My approach has been to introduce the research-based (yet socially constructed) social, economic, and ethical reasons for creating an equitable world. Once the context has been introduced and debated through dialogue, the relevance, importance, and priority of gender equality can be decided by the stakeholders. Bock (2014:741) noted clearly, "Gender is a political process and, hence, a matter of conflict and negotiation. The same is true for rural development". Stephens did agree that her work is political, so there is still an opportunity to create a process in my research to address this observation.

3.9.2 Value the Voices from the Margins

Feminist Systems Thinking asks practitioners to contextualise their interventions by paying "attention to marginalised, powerless groups and the integration of other oppressions" while also respecting the "social, cultural, racial, ethnic, economic and historical" experiences of both women and men (Stephens, 2013a:46-51). In combination with being gender sensitive, it is important not only to acknowledge the intersections of people's cultures and experiences, but also to commit to the moral imperative to challenge the damaging assumption that there is a clear-cut separation between who we are and what we think, to reduce the biases that come from current and historical social privileges (Stephens, 2013a). Stephens noted that patriarchal practices are deeply embedded in, shaped by, and interrelated with multiple societal

constructs that marginalise women and other societal groups in policies, economies, faith, legal and cultural paradigms. This exclusionary practice applies to both human and non-human voices (e.g. animals), recognising that both warrant equal respect and moral inclusion and that their political voice needs to be represented (Stephens, 2013a).

Although I agree with Stephens about the inclusion of human and non-human voices in Feminist Systems Thinking, my concern comes within the context of developing countries and rural communities. Food security is a political construct and is also impacted by climate. The ability both to influence political will and respond to scientific research on climate change influences on food security is feasible if prioritised. The space afforded to hearing the voices of non-humans on the margins is contingent on the context of the localised intervention in which one is working. Yet, on a global scale, population growth is outpacing food production, which underscores the challenge for high poverty areas struggling with food insecurity and hunger (Shoaf Kozak et al., 2012).

3.9.3 Centre Nature

Compelled from the cultural ecofeminism perspective, which fervently challenges the “ontological divide” between nature and people, “centring nature” seeks to “expose where traditional philosophical categories are built on exclusions of women, nature and subordinated others”(Stephens, 2013a:51). According to Stephens, the task of her framework is to “make visible hidden political dimensions achieved by seeking to expose where traditional philosophical categories are built on exclusions of women, nature, and subordinate others” (Stephens, 2013a:51). By neglecting to do so, claims Stephens, we are deluded into thinking that we (humans) are somehow separate and not “dependent” on nature (Stephens, 2013a). “The definition of nature can either be expanded or people can choose to reject much of human science and social systems for an alternative lifestyle closer to the natural environment of choice” (Stephens, 2013a:52). A difficulty, according to Stephens,

arises when humans attempt to not distinguish the boundaries between humans and nature, focusing only on sameness rather than difference. If we elect to extinguish or non-distinguish these boundaries, the effect will be a blurring by subsumption by one dominant system absorbing the identity and character of another (Stephens, 2013a). Stephens' (2013) recommendation was that we need to transcend a binary relationship and revalue and recast 'nature' as something worthy by respecting its difference from the human.

From Midgley's (1992a) point of view, society's poverty of humanism (i.e. current ecological and economic assumptions by society) is "erroneous" and to be effective members of the human race requires that we successfully live within a "sustainable and just society" (Midgley, 1992a:151). Another point made by Midgley about marginalisation within the debate of sameness or otherness, is that mere efforts of counter-marginalisation may actually exacerbate conflict without creating change because the marginalisation of women and nature is embedded in our institutions and expressed in rituals (Midgley, 2000). This embeddedness is at the heart of how gender identities are constructed (see Chapter 4).

As with the previous principle, and as Stephen notes, all of the decisions using Feminist Systems Thinking must be contextualised or situational. Not every group will be able to prioritise nature, but many may and will.

3.9.4 Select Appropriate Method/ologies

Here the similarities between cultural ecofeminism and CST surface with both embracing a pluralist stance, as "selecting methods is an act of moral responsibility" (Stephens, 2013a:53). Midgley is one of the most vocal proponents from the systems field of the validity of incorporating pluralism at both the methodological and method levels (Midgley, 2000). From my consulting experiences, I too have found the adoption of a pluralistic intervention useful. Employing methods from both systems and other

paradigms works to build the most appropriate, responsive intervention that encourages ongoing learning, reflection and the building of new skills for practitioners and participants alike (Midgley, 2000).

A challenge to pluralism comes in the form of charges of relativism from groups that have more positivistic or dominating paradigms. They regard this flexibility as threatening, or undermining the 'purity' of their philosophical and theoretical paradigms (Stephens, 2013a). Caution is suggested by both Midgley and Stephens when approaching problematic situations requiring intervention. They both advocate thoughtful boundary critiques to identify the depth and breadth of the issues at hand as well as the inclusion/exclusion and potential marginalisation of stakeholders. They also advocate the use of 'discordant pluralism' which critically considers similarities and differences of perspectives as a means of gauging the value of a particular perspective (Gregory, 1996). Further, they encourage transparency about differences in 'world views' and their potential impacts on decisions being made (Midgley, 2000; Stephens, 2013a).

From a practitioner standpoint, the reflection on what methodologies and methods to use is inherent in all of my work. I have to consider many variables (e.g. literacy levels, backgrounds, education, mobility), many of them remaining unknown until I am with the group. Flexibility, in line with this principle, is not only appropriate, but essential in order to respect the group's needs and concerns. What does give me pause with this principle is that I am still unclear on how I might translate this principle into a useful tool for analysis for rural communities. This query is addressed in more detail in Chapter 7, when I introduce Feminist Systems Thinking into my fieldwork workshops.

3.9.5 Bringing About Social Change

According to Stephens, CST and cultural eco-feminism share some mutual goals: "to operate beyond a positivist framework; to challenge the 'ontological divide' between 'man' and nature; and to achieve lasting social changes

through the application of theory in practice “ (Stephens, 2013a:51-58). Stephens (2012b:213-214) quoted Brydon-Miller et al (2004:13) suggesting activism as an ethical obligation of scholars as a means for social change:

“To decry injustice and refuse to act strikes me as a cowardly stance. It is my chief criticism of many scholars who, whether they derive their critiques from feminist, postcolonial, or critical race theory, rail against injustice but only from within the protected rooms of the academy and the quiet pages of journals...For too many however, these roles seem divorced from one another. Activism is an avocation, scholarship the day job, and the contradictions implied by this schism remain unspoken”.

Stephens’ commitment to political action is strong. She chose to use the term ‘sustainability’, as defined within the soft systems vernacular concerning “collective decision-making”, rather than the clichéd and heavily problematic definition used within the environmental sphere (Stephens et al., 2010a; Stephens, 2013a). Extending her political advocacy to social researchers and practitioners, Stephens (2013a) emphasised the “moral issue” represented in the decisions made, actions taken (or not) and consequences anticipated or realised, with the ultimate responsibility being at minimum to cause no harm.

The two key phrases that Stephens (2013a) mentioned are “*desirable and sustainable change*” (54, emphasis original) that were “viewed by the researcher and stakeholders *as appropriate to the circumstances or context of the intervention*” (55, emphasis added). These statements align with the level of cultural sensitivity with which I will be approaching this project. My intent is that the Feminist Systems Thinking principles, after being initially introduced will then ‘belong’ to the participants, to call into action any ideas they deem appropriate.

To indicate how Stephens piloted Feminist Systems Thinking, she used four case studies introduced below. After I briefly summarise each of her case

studies, I will summarise my ideas and potential concerns when considering using Feminist Systems Thinking in my research with rural communities in Central America.

3.9.6 Feminist Systems Thinking Case Studies

Stephens piloted Feminist Systems Thinking in four empirical case studies in North Queensland, Australia, to strengthen and inform the practice of community development and systemic intervention (Stephens, 2012a; 2013a). Each of the studies was conducted in a different community development environment with its own methodology, methods and tools.

3.9.6.1 Carrot on a Stick

This retrospective study was focused at the programme level to address health and diabetes prevention within a community including families and individuals who were vulnerable to early-onset of Type 2 diabetes. Type 2 diabetes occurs when the body cells do not react to insulin or when the body does not produce enough insulin, possibly leading to severe and life-threatening illnesses. The Feminist Systems Thinking principles were used as an analysis tool, not during the design phase, to create strategies or ideas that could guide future projects through follow-up interviews with participants. These strategies or ideas were intended to gauge the-participants' changes in attitudes towards dietary patterns and activity levels for adults and children after participating in nutrition and lifestyle programmes (Stephens, 2012a; 2013a).

Stephens found that using the principles was a useful way to draw focus on these topics and she recommended (cautiously) that possible interventions use all the principles (instead of in isolation) (Stephens, 2013a).

3.9.6.2 Yarrabah Kinship Gardens¹⁸

Working with a broad stakeholder group within an Indigenous Australian community boundary analysis resulted in a deeper interest and longer engagement with garden project. Using Feminist Systems Thinking as an intervention was seen as a qualitative counterpart to address the government's gender and equality policies on indigenous health, education and employment. Through on-going boundary analysis, a broad stakeholder group (e.g. traditional owners, elected leaders, elders, indigenous and non-indigenous stakeholders) made strides to heal the historical marginalisation of indigenous populations and women. Further, they addressed the impact that marginalisation had on health, life expectancy, child mortality, educational and employment rates (Stephens, 2012a; 2013a).

Stephens considered this project benefited from Feminist Systems Thinking's flexible and responsive qualities. The process of using non-quantitative methods allowed for a more inclusive experience away from the typical more positivistic governmental monitoring and evaluating goals (Stephens, 2013a).

3.9.6.3 Redlynch Real Food Network

In this case study, the Feminist Systems Thinking framework served as filter to monitor changes in a community development project on a high school campus. This campus instituted a social enterprise to gather fresh produce from local farmers and then create a distribution system. Stakeholders included parents, community and the school district, who created a feedback loop on how the fresh produce distributed through the project impacted families, school community,

¹⁸ A kinship garden is a term used by the Yarrabah community to indicate the family and community nature of the project (Stephens, 2013a)

suppliers and service providers and, most importantly for the project organisers, enrolled students (Stephens, 2012a; 2013a).

Of the five Feminist Systems Thinking principles, three were most prominent in this project: nature, appropriate method/ologies and bring about social change; with voices from the margins being the least prominent (Stephens, 2013a).

3.9.6.4 Greening the Economy

Guided by a stakeholder group composed of professional people from the local Council, businesses and NGO leaders, this project encompassed a meta-regional scale of environmental and economic modelling and planning for a low-carbon input model. At the heart of their analysis was to consider the negative impact of population growth on the environment (e.g. coral reef, rainforests). Using boundary analysis, and with flora and fauna central to their modelling, they sought to identify and inform the business sector's role in protecting a World Heritage natural resource.

The sample case studies provided an assortment of stakeholder groups and of ways in which Feminist Systems Thinking was enabled (e.g. retrospectively, explicitly). The benefit of using the principles is that they provide a strong focus for stakeholders, planners or evaluators to have common talking points to reflect back on or to create more dialogue. I can also see where the creation of specific guidelines on how to co-create definitions or talking points for each principle would help deepen the learning, situate the definitions and build capacity.

Stephens's grounded theory research concluded that both ecofeminism and CST share similar epistemological perspectives and goals, and have areas where they can inform each other. One of the key goals of both bodies of knowledge was to move beyond positivism and "challenge the ontological divide between

man and nature” (Stephens et al., 2010a:383) in order to facilitate lasting change (Stephens, 2012a; 2013a).

3.9.7 Critique of Feminist Systems Thinking

From an intervention standpoint, Stephens’ work attracted me because her five principles were flexible enough to use systemically during the different phases of a project: design, implementation and evaluation. From an academic standpoint, I saw an opportunity to build on her work by turning the Feminist Systems Thinking principles into organisational development tools for use in emerging economies with rural business owners. Additional internal and external factors are also accounted for in assessing how to improve efficiency. Her research, and the resulting framework comprising of five “ethical principles” were easy for me to understand and see how they can be applied in different settings to shine a light on potential marginalisation. Feminist Systems Thinking also provided me with a culturally respectful and appropriate framework upon which to build an effective systemic intervention for my own research with micro and small business entrepreneurs in rural and economically constrained regions of Nicaragua.

Nevertheless, I did not take forward the Feminist Systems Thinking framework uncritically. At this point, prior to my fieldwork in Central America, I had some initial reflective questions, later to be research questions in Section 4.7:

1. Stephens (2012a:6) claims that “Feminist Systems Thinking principles are guidelines or indicators rather than a theoretical position”. But Stephens also claims that her work is political and therefore should Feminist Systems Thinking not be more explicit and offer more than guidelines?
2. A concern I had was the unknown transferability of the Feminist Systems Thinking principles, which were piloted with projects in Australia with completely different societal cultures and barriers

from the ones I would encounter in Nicaragua. This concern deepened when I wondered whether the terminology and reasoning (academic and imbued with systems jargon) could be adapted sufficiently so that it is not simply rejected as a Western-constructed model. How would any changes I introduced impact on the core ethical assumptions of Stephens's theory?

3. Stephens used Feminist Systems Thinking primarily as a tool for reflection by practitioners rather than conventional stakeholders. I believe the tools we use with the latter are equally important as our own principles for reflection. We need the means to convert theoretical insights into practical interventions. (I am reminded of Flood and Jackson's, 1991, critique of Ulrich, 1983, for not going far enough in translating his social theory into systems methods). How suitable would Feminist Systems Thinking be as a tool to empower 'ordinary' women in rural Nicaragua? There is a need for a process to facilitate stakeholder access.
4. Many Nicaraguan rural entrepreneurs are from very impoverished communities in a country with a 78% average (less in rural communities) literacy rate. Would they be able to connect its broad principles to their practice? Feminist Systems Thinking had not been tried in a developing country before, let alone one where illiteracy is high in many regions.
5. Because of its non-hierarchical design (with all five principles treated as equally important), gender is not prioritised. This prioritisation is recommended by most GAD (GAD literature will be discussed in Chapter 4) authors in the current gender and development literatures (Jahan, 1995; Porter & Sweetman, 2005b). Would the focus on gender become lost in the context of the deployment of the other principles in a patriarchal society with generations of subjugation?

6. Similar to other CST theoretical debates (other than Ulrich's, 1983), Stephens work does not explicitly address how issues of power and coercion can be considered. This absence could be particularly risky when addressing sensitive topics such as gender, nature, marginalised voices and social change in development contexts.
7. The framework status, although flexible by design, does not readily lend itself to an in-depth gender analysis to be done as a foundational step in any project, as recommended by current gender mainstreaming practice today.

As with gender mainstreaming, there is a paradox with the Stephens' framework. On the one hand its lack of constraints allows for its integration and adaptation transversally throughout a project or an organisation, encouraging a more transformative impact. Equally, when seeking to promote long-lasting social change, its flexible nature also could weaken its leverage on power redistribution (Jacquot, 2010).

3.10 Chapter Conclusion

As an epistemology, CST describes and explores the nature of knowledge and their "commitments" to pluralism, boundary analysis and improvement informed and shaped my applied work in Washington D.C. and Nicaragua. This iterative analysis included not only my perspectives, but also included the stakeholder groups with which I worked.

Because of their theoretical roots in both CST and feminism; systemic intervention (Midgely, 2000) and Feminist Systems Thinking (Stephens, 2013) provided me with essential frameworks for my research. Yet, Stephens' work aside, as a discipline CST appears to me to be out of touch with the responsibility, significance and oppressive realities of gender inequality within our societies. CST also seems to have disengaged from the academic discourse

within feminism and its role in economic development, particularly in its relationship to poverty.

My role as a gendered systemic interventionist is to go beyond what has already been identified by Stephens and others (for example, Carter, 1990, Stephens 2013) as a gap in systems literature regarding gender equality. The purpose of this research is to build on knowledge developed in CST and FST, which prioritize perspectives, boundary analysis and interrelatedness of different systems and overlay those key systems theories with work that has been done within gender and development literature as a way to create a gendered systems analysis methodology. To do this, a clearer understanding will be needed of the work that has been done within the gender and development field.

Chapter 4 Gender and Development: Theory and Practice

Economic 'development' in its current state has deep roots, notably political ones. It arose post-World War II reconstruction as a way for industrialised countries to provide support and assistance for 'developing' ones guiding them to the same economic stability as in the Western world. At the now infamous 1944 Bretton Woods Conference attended by 44 allied nations, two influential institutions were created as a new framework for economic stability that still regulates economic development policy worldwide today. Globally recognized as the International Monetary Fund and the World Bank, they are both responsible for global economic issues and have similar roles in strengthening economies, yet in practice, they have distinct roles. The International Monetary Fund assists, provides oversight and promotes economic exchanges amongst its member nations while the World Bank is central to the economic development of the world's poorer countries, providing long-term financing with fiscal stipulations (Potter, 2008; Rai, 2011; International Monetary Fund, 2016).

Bretton Woods served numerous purposes: one, as a platform for discussing decolonization; two as a security response against the perceived threats between the polarised ideologies of the Western 'first world' nations and the Soviet bloc 'second world' nations; and three, and most significant for this research, as an economic strategy to build alliances with 'third world' countries by modernizing them to a Western model subsidising poverty reduction (Pieterse, 2009; Rai, 2011; Hopper, 2012).

The enduring and often detrimental economic policies that were and are mandated by Western institutions like the International Monetary Fund and World Bank are at the axis of development theory and continue to both support and undermine countries primarily in the southern hemisphere of the globe or 'South' today in the twenty-first century. The multi-faceted food, oil and economic crises that have disturbed global economies since 2007, some acutely and some less so, have forced them again to turn to the International Monetary Fund to borrow funds for stabilisation in order to be able to repay their already hefty international debt. As with most earlier global economic crunches, these more recent ones continue to have a common thread in that they are

gendered. For example, women are 'virtually absent' from leadership roles that guide decision-making in the financial sector (Elson, 2010). This invisibility is systemic with economic forecasts' data gathering and analysis woefully underrepresenting women's economic contributions; the inequitable access to and distribution of private or public finance; and the neglectful and historical norms or underrepresentation of women's roles as carers and producers (Elson, 2010).

Philosophically, economic development efforts explicitly include 'empowerment' as an imperative to design, implement, and evaluate interventions with emancipatory principals (United Nations Evaluation Group, 2014). As a reminder, I am using the definition of empowerment used in a cross-section of feminist literature (Friedmann, 1996; Sen, 1997; Kabeer, 2005; Devy, 2012; Bishop & Bowman, 2014). Empowerment imbricates the ideal that women can claim and relish their gender equitable and human rights to make decisions and have choices about their lives (Bishop & Bowman, 2014).

Returning to Critical Systems Thinking, Chapter 3, gendered emancipatory debates are precisely what are missing, making unclear how gender might influence the goal "to achieve for all individuals...the maximum development of their potential" (Flood & Jackson, 1991e:200). From a CST perspective there is a perceived confidence that social exclusion or marginalisation can be mitigated or minimised by critically reflecting on the 'involved' and 'affected', and on the 'sacred' and 'profane', among stakeholder groups (Ulrich, 1983; Midgley, 2000). The absence of a specific gender lens in CST research makes it difficult to document or ascertain whether the mere focus of emancipation is enough to mitigate the marginalisation of women.

This gendered ambiguity when using CST in global development efforts to eradicate poverty raises both ethical and moral cautionary flags. Reflecting on the 2009 World Bank data for Nicaragua, 43% of the national population live under the poverty line, with the rate jumping to 63% in the rural areas (where this research was conducted) (World Bank, 2009). The report goes on to note the

disparity in women accessing skill-based or vocational training and when capacity development is offered, when technological and agricultural training sessions are offered in rural areas, over 70% of the participants are men.

Recognising the gendered research gap within CST, I turned to a body of literature with an analogous value-aligned field, GAD, which has grappled with gender equality for over 70 years. I will use global development and feminist literature as a way to analyse, critique and strengthen systemic interventions, using a gender lens.

An intriguing part of the global development and the systems fields collectively was their struggles with similar demons during parallel timeframes. They shared many experiences, concepts, and goals; and yet knew relatively little about each other. They both pushed against the contemporary reductionist ideology which said little or nothing about accounting for the plurality of voices and values from diverse stakeholder groups (Checkland, 1981b; Jackson & Keys, 1984; Sen & Grown, 1988). Additionally, there were efforts to thoughtfully use different methods and methodologies in order to remain reflexive to the emergent qualities within practice (Ulrich, 1987; Wadsworth, 1993; Reason, 1994). As both fields struggled with ways to increase participation and decrease marginalisation, new approaches based on previous experiences and critiques began to emerge.

The fight against the marginalisation of women has been primarily addressed in feminist literature and tangentially in global development literature. It is this research that I use as the underpinning theories and practices in grappling with the complexities that any society has in attempting to achieve equality.

4.1 Chapter Structure

In seeking to inform CST about how global development has addressed the persistence of gender inequality, Section 4.2 first provides some background on

what is meant by gender equality within global development and feminism. Sections 4.3-4.6 summarize how women's needs and ideas slowly began to gain significance in development projects during 80 years of foreign aid. Section 4.7 is pivotal to this thesis as it introduces my research questions based on the literature reviews on systems and gender, combined with my previous field experience working on gender equality in development countries. Section 4.8 summarizes and concludes Chapter Four.

4.2 Gender Equality: What is it?

As defined in Chapter One, the definition of gender equality suggests that equal opportunities, access, and rights are to be available and accessible equally by women, men, girls and boys. These gender equitable ideals and resulting operational definitions have taken shape over decades. Almost any society's understanding of the world has been built over centuries by way of listening, speaking, writing, observing and interpreting knowledge and theories. Some of these learnings became societal norms which then have been passed down as knowledge and practice through generations. On closer inspection, this historically-laden knowledge has evolved almost exclusively in societies where men dominated and organised access to political and societal norms, laws and religious practices. A prominent feminist theory called Standpoint Theory describes the importance of socially created knowledge, "where we are socially situated (i.e. where we 'stand') matters and has important implications for social and political power and the creation of knowledge" (Brisolara, 2014:6). Consequently, women's experiences, and what they value as important, may not always have been adequately represented in the dominant "male-centred and biased theories and approaches but also the objectifying, positivistic epistemologies on which they are based" (Brisolara et al., 2014:6). Essentially, these types of patriarchal constructs were, "...based on the belief that the male is the superior sex and many of the social institutions and much social practice is then organised to reflect this belief" (Spender, 1985:1). Fundamental

“elements of research (e.g. its methods, categories, assumptions, ways of knowing, writing style) were created and regularly shaped by male discourse, resulting in the silencing of women’s experiences and perspectives” (Brisolara, 2014:7). Thus, most knowledge has been created within patriarchal societies where men were free to debate and contribute to knowledge creation while women were historically excluded from its production and largely from its dissemination (Spender, 1985; Walby, 1990; Tickner, 2006; Brisolara et al., 2014).

Feminist scholars argued that knowledge which has primarily been created by, and based on the male experience, will inherently be biased and potentially represent a skewed sense of reality and ideals (Bailey et al., 2000). This myopic perspective has determined the need for theories based on women’s experiences and points of view. Although feminist theory encompasses a broad range of theoretical discourses and debates with no agreed consensus on categories and intervention priorities, feminism does have a steady and common focus on “the nature and consequences of gender equality” (Brisolara et al., 2014:4).

“Most forms of feminist theory offer a way of examining and understanding social issues and dynamics that elucidates gender inequalities as well as women’s interests, concerns, and perspectives. Feminist theories offer critiques of the assumptions, biases, and consequences of androcentric philosophies and practices. Most feminist theories are applied with the intent of contributing to the promotion of greater equity, the establishment of equal rights and opportunities, and the ending of oppression” (Brisolara et al., 2014:4).

The role of gender equality in Northern and Southern economies is tied to the ideal of progress, a legitimately contested concept. According to feminist sociologist Walby (2009), there were no simple ways to define ‘progress’ but she offered three approaches. The first was tied to modernity, viewing the

transformation of a society based on changes achieved through industrialization and urbanism (Walby, 2009). A second approach rejected the concept of progress as being “falsely universalistic and ethnocentric” preferring to embrace the potential of multiple realities of a ‘good life’ based on individual understandings, societal cultures and norms (Walby, 2009:4). The third position Walby (2009) labelled ‘progress’ as a highly disputed and actively debated understanding open to arguments through politics, philosophy, data and analysis, etc.

Within this disputed third position, Walby (2009) proposed four ‘alternative goals’ for achieving progress: economic development, equality, human rights, and human well-being. Progress within an economic paradigm suggests that human well-being is advanced through financial growth and development. The notion of equality, with similarly contested perspectives in the global North and South, can be seen either as a measurable outcome or as an access to opportunity (Walby, 2009). When thought of as an outcome, gender equality had a stronger connotation when measuring progress for its impact on social systems and legal processes. When thought of as opportunities, gender equality may have been a suggested process that had been offered, but the opportunities were not actually a call for societal change (Walby, 2009).

My belief is that although both of these impacts are laudable, what ultimately needs to happen, and yet is the most difficult contribution to ‘progress’ to achieve, is a paradigm shift. It is easier to drive legal and structural changes through government legislation. However, a fundamental societal change or enlightenment requiring shifts in world views, if unaccompanied by paradigm shift, cannot bring about long-lasting change. The ideal of a paradigm shift will be explored in the fieldwork Chapters Six and Seven.

Gender equality clearly has eluded global societies for centuries. Even in more contemporary efforts in poverty reduction, using thoughtful and thorough consideration of gender, inequality is omnipresent. As noted in the

introduction, to date, no country can claim to have closed the gender gap or eradicated poverty. Research is clear; poverty impacts both genders although women are more vulnerable worldwide, presently and historically (Boserup, 1970; Kabeer, 2008). At the 1995 United Nations World Conference on Women, this relatively comprehensive definition of poverty is still true today:

“Poverty has various manifestations, including lack of income and productive resources sufficient to ensure a sustainable livelihood; hunger and malnutrition; ill health; limited or lack of access to education and other basic services; increasing morbidity and mortality from illness; homelessness and inadequate housing; unsafe environments; and social discrimination and exclusion. It is also characterized by lack of participation in decision-making and in civil, social and cultural life” (United Nations, 1996:18).

The report also clearly established why women were significantly more susceptible to the impacts of poverty:

“...women face barriers to full equality and advancement because of their race, age, language, ethnicity, culture, religion or disability, because they are indigenous women or because of other status. Many women encounter specific obstacles related to their family status, particularly as single parents; and to their socio-economic status, including their living conditions in rural, isolated or impoverished areas...” (United Nations, 1996:18).

Even with such recognised definitions of gender equality and poverty, the concepts remain abstract when considering what solutions are most impactful when translated to practical responses (Momsen, 2010). The extensive cross-disciplinary debates (Harding, 1989; Porter & Judd, 2000; Baumgardner & Richards, 2003; Brydon-Miller et al., 2004; Eade, 2015) about the epistemology and nature of gender equality as an orienting concept are most expansively deliberated within feminist literature. The anchoring ideals of gender and equality within feminist discourses are complex. It would be difficult to

represent their vast nuances here. It is useful however, to unpack some of the feminist debates influential on gender equality in global development, to support my proposition that gender equality requires both a systematic and systemic approach in development interventions.

4.3 Early Feminism

Early feminists, seeking legal and voting rights during the 19th and early 20th centuries, subscribed to an essentialist and universal understanding of women's collective experiences united by their sex (Young, 1999). From the 1960s onwards, differentiation debates proposed that the previous homogenisation of women and their experiences was actually causing more marginalisation of non-white, non-Western women (Young, 1999). In some cases, there was resistance from some feminists claiming that 'differences' aside, there were still some universalities about women's experiences (Okin-Moller, 1989). However, the debate was not a simple one. Okin-Moller (1989), for example, argued that by focusing on 'differences' among women weakened the debate against the existing patriarchal power hierarchies and hampered the agenda of political change.

The multiple typologies of gender equality are controversial and well documented (Flax, 1992; Moser, 1993; Chant, 2012; Chant & Sweetman, 2012; Kabeer, 2015b; Kabeer & Sweetman, 2015; Perrons, 2015). A fundamental, dominant and enduring subject of intense feminist debate has been the 'sameness/difference' debate (Scott, 1988): "simultaneously normative, philosophical, theoretical, substantive, empirical, and policy-relevant" and the arguments span a continuum that unites voices or fragments feminist efforts for equality (Walby, 2005:326). The debate about 'difference' within feminist literature has been primarily preoccupied with four tensions. The first one distinguished between the sexes, female and male, biologically and socially. Differences between women, such as race, class, sexual orientation and ability, were the second tension. Third, were the theoretical and social differences and

values among feminists such as liberal, radical, socialist and others. The fourth tension was more fundamental. Many feminist theoretical positions, are rooted in what is referred to as the 'Wollstonecraft's Dilemma' (Wollstonecraft, 1792). This dilemma was defined by the quest to have equal citizenship within society while simultaneously differentiating and validating women's unique needs and circumstances (Felski, 1997; Fraser, 1997; Ferree & Gamson, 2003; Walby, 2005).

For some feminists, the central friction on the path to equality was about citizenship and whether a society that historically established the exclusion of women, could actually adapt itself to fully provide and respond to women's intellectual and economic rights (Lister, 1995). The danger was that it was not adequate to merely 'add-on' or demand the 'same[ness]' rights as those of men (Lister, 1995). This debate was crucial, for it questioned the asymmetrical dualism of 'women' viewed as the more docile gender enmeshed in the 'private sphere' of a social hierarchy, while 'men' were more dominant and had a historical legacy of controlling the 'public sphere' and its association to increased access to resources and therefore power (Flax, 1992). Flax continued, "Within contemporary Western culture, differences appear to generate and are certainly used to justify hierarchies and relations of dominations including gender-based (or gender-ascribed) ones" (1992:193). Those early sameness/differences debates that drove early feminist political activism also played a role in hindering related movements for equality (e.g. Lesbian, Gay, Bi-sexual, Transgender and Queer). "Sameness", or the demand that government afford equal rights to women/men; gay/straight, etc. distracted from the structural barriers hampering equality, and the need of comprehensive law reform based on human rights, not merely equal rights (Razavi, 2012; Chávez et al., 2015).

The conceptualisation of a gendered citizenship over the centuries is like a rubber-band, circular in nature with varying stages of tautness and laxness. This gendered elasticity conundrum was even more multifaceted when

considering the uniqueness of women distinguished by their race, class, age, sexual orientation and other characteristics beyond merely being women (Crenshaw, 1989; Lister, 1995). The poet June Jordan said it best: “Every single one of us is more than whatever race we represent or embody and more than whatever gender category we fall into” (quoted in Parmar, 1989:61).

Early feminist debates have been criticised for narrowly focusing on economic or material inequities while minimizing other dominant inequities such as class and race or areas within the ‘domestic’ sphere (Armstrong, 2002). The steadfast conflict was the gendered distribution of labour within a society, equally in the ‘private’ household sphere and the ‘public’ political sphere. Part of the solution, according to feminists from the 1980s and 1990s was to redistribute the participation imbalance whereby most men were inactive within the private sphere (e.g. child and relative care, cooking, household activities) while also deeply changing the ‘public’ sphere to make it a new social order of citizenship more closely aligned with women’s interests and needs (Okin-Moller, 1989; Lister, 1995).

An interesting proposal was Walzer’s theory of ‘complex equality’, as analysed by Armstrong (2002), in which he suggested three ways to reconstruct equality without falling into egalitarian pitfalls (Walzer, 1983). First, he encouraged giving “equal value to all goods we distribute among ourselves”, since all of them are capable of becoming conduits for inequality and “therefore all relationships are relationships of justice” (Walzer as quoted in Armstrong, 2002:69). Second, universalist ideals or theorising of equalitarianism should be discarded for the theories were ahistorical, gendered and created marginalisation. Third, the argument for equality had to be based on the current context being examined (Walzer, 1983).

Trying to dismantle deep-rooted theories, or ways of knowing as suggested by Walzer, is unproductive from my perspective. What can be done, and should be done, regardless of the gender of the researcher, is to mainstream the ideal of

gender equality into one's work in an attempt to identify historical and current marginalisation. My faith in the solution of redistribution, or 'rebalancing' of the private and public spheres between women and men creating new paradigms on work-life responsibilities, as Walzer suggests, is dampened by what I see as a global gender impasse from both economic and societal standpoints. This type of comprehensive societal change suggests there is an active narrative. It suggests that there is commitment and willingness by both genders to genuinely abdicate their own spheres of influences and control. It requires that gains made from previous inequalities or privilege might need to be shared or relinquished completely. At the same time, it posits that whole new skill sets and decision-making paradigms of what constitutes fair and equal citizenship will develop. As Mouffe (1992) stated:

"A radical, democratic citizen must be an active citizen, somebody who *acts* as a citizen, who conceives of herself as a participant in a collective undertaking" (1992:2).

"We need to go beyond the conceptions of citizenship of both the liberal and the civic republic traditions while building on their respective strengths" (1992:225).

"Instead of shying away from the component of violence and hostility inherent in social relations, the task is to think how to create the conditions under which those aggressive forces can be diffused and diverted and a pluralistic democratic order made possible" (1993:153).

The feminist arguments about citizenship, work-load rebalancing and the 'sameness/difference' debates that occurred in the feminist movements of the global North in the late 20th century, have had direct repercussions on development policy broadly and for women's equality specifically (Felski, 1997). Initially, women were seen as part of a homogenised group along with men in their struggle to exit poverty; however, it soon became apparent that

different approaches were essential to adequately support societal change with all its complexities. Since gender equality policy is inextricably tangled in global development policies, it is important to understand how those economic policies changed over the decades and the implications for gender equality as a result.

4.4 Modernisation and Dependency Economic Theories (late 1940s– 1970s)

The struggle for gender equality, particularly in countries with high poverty rates (e.g. percentage of people earning less than \$1.25 per day, (World Bank, 2009), is intricately linked to global and economic politics and the associated values embedded in those policies are conveyed in the expansive field of international development (Black, 2007).

Many attribute the origins of modern day development conceptualisation to a 1949 speech made by U.S. President Harry Truman in which he placed responsibility on First World economies to 'bring development' to the more 'underdeveloped areas' of the Third World (Potter, 2008). The ensuing Modernisation Theory, which hypothetically replaced colonial economics and reigned as a primary strategy post-Bretton Woods, dominated until the 1960s. Modernisation Theory was a method for countries in the 'Global South'¹⁹ to become 'modern' by 'transitioning' from rural agricultural communities to imitating the industrialised West or 'Global North' through economic growth models such as capitalism and industrialisation (Hopper, 2012). It also advanced political models that coordinated social and organisational structures (e.g. entrepreneurship, marketisation and privatisation) (Potter, 2008; Pieterse, 2009; Hopper, 2012).

¹⁹ In its most simplistic definition, the classification of countries into Global North and South refers to the geographical split between countries in the northern hemisphere that were more economically wealthy and more modern and those in the southern hemisphere that were poorer nations (Hopper, 2012).

Within development efforts, thematic campaigns were celebrated such as the United Nations Development Decade (UNDD, 1960-1970), largely synonymous with industrialisation efforts. This campaign was simultaneously celebrated and faulted for its efforts to bind aid and development together. During those ten years, every industrialised country was encouraged to take one per cent of its Gross National Product (GNP) and devote it to 'aid' (Black, 2007). For some of the UNDD participant countries, the results were mystifying. After a decade-long effort, for the a majority of developing countries that did raise their GNP per capita by at least five per cent, tragically more people in those countries were poorer than before the decade began (Black, 2007).

Frustration grew amongst feminists in the 'North', noting two realities. First, little of the development funds being transferred were allocated to balance women's inequality (Kerr, 2002). Second, it was evident that the industrialised post-war Keynesian and Rostownian economics paradoxically used more resources than they created (even with many countries raising their GNP during UNDD) (Kerr, 2002). Negative results (e.g. new technology programmes to increase productivity on farms) were gender-blind, affording men new skills and often resulted in increasing unemployment for women (Boserup, 1970). The increased unemployment for women was attributed to the limitation of their access to productive work and urbanisation efforts. The latter encouraged rural families to move to the cities where more jobs were available. However, this separated women from their support networks; and, once in the city, they were marginalised by modern work sectors which were closed to women due to gender stereotypes (Boserup, 1970). Increased unemployment was aggravated by the lack of organisational infrastructure in poorer countries impeding their abilities to implement structural changes, which resulted in many cases in increased dependency on wealthier nations in the North (Rapley, 2007). This central notion of Dependency Theory suggests that the natural and labour resources of poorer 'periphery' countries were being exploited by the 'core' wealthier ones. Critics of this model contended that the dependency dynamic allowed wealthier countries to benefit by absorbing resources

below their true market value. The periphery countries providing the resources, however, were not on an equal footing. They were unable, therefore, to advance their internal domestic markets and infrastructures, leaving them exposed to global economic swings (Hopper, 2012). This dependency relationship began to require poorer countries to acquire support in the form of financial loans from the World Bank and the International Monetary Fund (Pieterse, 2001; Hopper, 2012). This necessity undermined their already fragile economies and thus further impoverished people through increased debt burden. As the number of indebted nations grew, the countries of the Global North became uncomfortable with the economic programmes they had instituted for there was a belief they were not getting a return on their investment and they clamoured for a more 'structured' intervention model to enable poorer countries to become more prosperous and less dependent on development resources from the North (Pieterse, 2001; Hopper, 2012).

4.5 Globalisation, Structural Adjustment Programmes and Women

The increasing political conservatism that began to emerge in the Global North and in multilateral institutions, saw a movement away from basic aid for human needs as the core concern of international aid (Connelly et al., 2000). This political conservatism, most commonly referred to as 'neo-liberalism', spawned impactful economic policies, ideologies and governmentalities (Larner, 2000). The premise of neo-liberal governance was that "markets are understood to be a better way of organizing economic activity because they are associated with competition, economic efficiency and choice" with central themes of deregulation and privatisation (Larner, 2000:5).

Simultaneously, in the late 1970s, another global phenomenon was evolving when oil-producing countries (OPEC) experienced petroleum export shortages combined with steep increases in 1973 oil crisis and the 1979 energy crises²⁰. The impact of the

²⁰ World oil prices quadrupled between October 1973 and January 1974, led by Arab members of the Organisation of Petroleum Exporting Countries (OPEC). For developing countries, they were forced to fund their energy imports by increase their debt to foreign countries through

shortages was severe, with reverberations throughout global economies. For poorer countries, the result was a need to borrow large sums of money from the World Bank and the International Monetary Fund to survive and to meet the demands of modernising their countries (Sen & Grown, 1988; Harcourt, 1994).

For the Global South, the neo-liberal mind-sets in the North promoted by think tanks and multi-national corporations, and supported by the world's purse-strings holders, the International Monetary Fund and the World Bank, was "both a political discourse about the nature of rule and a set of practices that facilitate the governing of individuals from a distance" (Larner, 2000:6). Neo-liberal ideals not only permeated the political realm, but also deeply influenced social movements through the "extensions of politics into 'lifestyle' issues such as health, food, sexuality and the body" (Chen & Morley, 2006 in Larner, 2000:10) by rolling back employment through privatisation of government industries and slashing inclusive social welfare systems (Larner, 2000). These practices also changed how governments governed, paradoxically instituting policies which "...may mean less government, [although] it does not follow that there is less governance" (Larner, 2000:12).

Neo-liberalism partnered with the oil crises brought on political preoccupation with 'penalising' developing countries' weak infrastructures, economies, mismanagement, escalating debt and severe underdevelopment (Connelly et al., 2000). The emergence of Structural Adjustment Programmes (SAPs), designed and managed by the World Bank and the International Monetary Fund, was a neo-liberal response to concerns about the rising debt of many Southern countries (Elson, 1995a). These SAPs forever changed the landscape of international aid and competition. What SAPs ultimately created was more inequality (Elson, 1995a). From the perspective of Southern countries, and many

borrowing (University of California Berkeley, 2016) The 1979 energy crises had many contributing factors: world events in the Middle East (i.e. the Iranian Revolution); global increase demand for oil; 7% reduction of Iranian oil output and a widespread speculative hoarding (Graefe, 2013)

NGOs supporting them, these neo-liberal²¹ policies have created a debilitating double standard. This double standard benefits the global North and makes it impossible for poorer countries to play evenly in the global market (Walby, 2007). Examples of these policies, many which were not being implemented in the Northern countries but mandated for Southern ones as a condition for economic loans, included the reduction of state welfare spending; deregulation of unemployed workers' rights and benefits; privatization of publicly owned commerce, utilities and services; and the turning of areas previously managed by the government, such as welfare provisions into market-driven allowances (Walby, 2009). Other consequences resulted from SAPs' mandates. With a focus on exports, domestic economies were weakened. Incomes declined as government subsidies were withdrawn. Family cash payments for social services increased as government programmes became privatised (Sweetman, 2012). According to Watkins and Fowler's Oxfam publication of 2002, the then, "existing trade system is indefensible. No civilised community should be willing to tolerate the extremes of prosperity and poverty that are generated by current trade practices" (Watkins & Fowler, 2002:4).

According to Sparr (1994) the impact the SAPs requirement for the rolling back of state supported services impacted both sexes. However, it made women's lives more oppressive by often increasing their daily burdens, for they needed to create more income-generating activities to compensate for the job losses or instability of their husbands' situations (Sparr, 1994). According to Sparr (1994) the argument was that by minimizing government involvement in the economy through the privatisation of public interests, private companies could be more efficient at running the enterprises and therefore avoided unnecessary government spending. Sparr (1994) also noted several impacts on women with the shrinking of the social welfare state model: with increased privatisation, women who did have jobs were replaced by men who did not require SAP mandated childcare; working conditions deteriorated as work day hours

²¹ "Neoliberalism elevates the notion of market effectiveness into a guiding principle for action and attempts to reduce the level of state intervention into the economy, prioritizing the individual over collectivism" (Walby, 2009:11).

were extended to meet production demands; while wage differentials grew as women sought more informal and less secure employment, resulting in their seeking work further from their homes or even migrating to foreign countries (Sparr, 1994). Sparr's (1994) research also found that girls dropped out of school to replace their working mothers in household tasks. Women's gendered activities (e.g. as caregivers of children and the elderly) increased when government social programmes were dismantled (Sparr, 1994; Elson, 1995a; Chant & Sweetman, 2012). New approaches were needed.

Historically, when looking at global inequalities, the contention is that with the onset of neo-liberalism policies, developing countries' poverty levels did not improve and may have even worsened (Oberdabernig, 2010). Income distribution has not become more equitable in the Global North or South (Oberdabernig, 2010). Human rights advocates and feminists note that, as the balance of societal support abated, women suffered most of all (Perrons, 2015). Feminist economists (e.g. Boserup, Elson) have long contended that economic policies should not be implemented without a more thorough analysis of the social impacts they might have particularly on marginalised groups:

"A gender and equalities approach reminds us of the politics which exists beneath the ostensibly technical and value-free concept of the economy, and alerts us to the insights of feminist and other alternative economists which challenge the idea that the economy either is or should be separate from society and where market forces should be allowed to operate in a 'free 'way. Instead they recognise that the economy is part of society and this relationship should be acknowledged in order to shift understandings of the relationships of the economy to society" (Perrons, 2015:218).

4.6 Development Approaches and Women

The evolution of women's gender equitable access in development studies' theories and practices, not unlike systems thinking (Midgley, 2003), has been continuously building on prior approaches, not replacing them. The progressive debate created both controversy and new gender responsive frameworks throughout the 20th Century. Up

until the early 1970s, policies and programmes were not disaggregated or targeted by gender. The assumption was that women would benefit from economic interventions via a trickle-down approach from the men as primary heads of households (Rathgeber, 1990; Parpart, 1993; Young, 1997).

A landmark publication in 1970 by Boserup (1970) provided empirical research using gender as a variable in a quantitative analysis that forever changed the landscape of development policies. Boserup launched a new understanding about the roles of women. The Women in Development (WID) approach was coined using Boserup's work which stressed that women's contributions to the agricultural and industrial economic development of countries had been underestimated from colonial times onwards. Furthermore, development policies and practices were biased against women (Boserup, 1970). Although later criticised for its generalisation of the nature of women's work and roles, this influential work beckoned a new era of research and inquiry, responding with more gendered responses and policies that shepherded in the United Nations Decade for Women (1976-1986) (Rathgeber, 1990; Boserup, 2007).

4.6.1 Women in Development Approach (1970s to mid-80s)

The Women's Committee of the Society for International Development based in the United States was credited with underscoring the role of Women in Development (WID) using Boserup's research as evidence. The WID approach, which heralded a new era yet still had several important limitations to overcome, was closely linked with the modernisation paradigm and held many mistaken beliefs hampering progress for women (Rathgeber, 1990; Razavi & Miller, 1995). One such limitation was that women and men experienced poverty and development in the same way. Another assumption was that many women, whether part of a male-led household, or certainly as single heads of households, benefitted from 'trickle-down' of resources afforded to men (Rathgeber, 1990; Razavi & Miller, 1995). Another mistaken belief was that women were less likely to benefit from new agricultural technology and training, so this was offered primarily to men (Marshall, 2000). Most notably, it became clear that

development was not a linear process, so merely including women in existing programmes, without challenging existing social structures and policies, was ineffectual (Rathgeber, 1990; Marshall, 2000). However, WID efforts did generate calls for new research. The call was for research to challenge the prevailing paradigm that women's subordination was due to their exclusion from the formal marketplace versus larger societal barriers. There was also a call for research that analysed and evaluated the impact of development projects on rural women in particular (Razavi & Miller, 1995; Beetham & Demetriades, 2007).

4.6.2 Women and Development Approach (mid-1980s onwards)

Responding to the exclusion of women from WID programmes, a new approach began to emerge in the late 1970s called Women and Development (WAD). The WAD approach sought to resolve the previous inadvertent oversight and subordination of women by acknowledging and understanding how power, conflict and gender relations disadvantaged women. The WAD perspective acknowledged that although women and men had been included in development programmes since their inception, women were central and economically important to the economics of their countries both inside (reproductive) and outside (productive) of the household (Rathgeber, 1990; Razavi & Miller, 1995). Merely integrating women into current practices was in essence reinforcing the international structures of inequality (Rathgeber, 1990; Razavi & Miller, 1995). It became important to analyse the symbiotic relationship between gender and the impact of class, race, ethnicity and employment (Rathgeber, 1990; Razavi & Miller, 1995).

Although WAD was more effective in delineating women's responsibilities than WID, it stopped short of deconstructing the role of patriarchy in women's subordination and oppression (Rathgeber, 1990). Within WAD there was an assumption that women's access to economic, political and social structures would improve as the global structures become more equitable (Rathgeber, 1990). Influential writings of the time began to distinguish between using data analysis that disaggregated by biological sex

characteristics (e.g. male vs female) versus beginning to explore the complexity represented in socially constructed gender identities, ideologies and practices (e.g. maleness vs. femaleness) (Rubin, 1975; Edholm et al., 1982). These distinctions began to be articulated in development policies as well. The dissimilarities served two primary purposes: first, they were a means of understanding the complexity of women's subordination and, secondly, if gender roles were socially constructed, they could be influenced and changed over time (Rubin, 1975; Edholm et al., 1982).

One significant shift with WAD was the use of disaggregated data to help inform and understand not only women's realities, but also men's by using gender analysis frameworks to better reveal the social relationships:

"The [gender roles] framework takes as its starting point that the household is not an undifferentiated grouping of people with a common production and consumption function. Households are seen as systems of resource allocation themselves (Feldstein et al., 1989:10). Gender equity is defined in terms of individual access to and control over resources; women's (actual and potential) productive contributions provide the rationale for allocating resources to them. Gender equity and economic efficiency are thus synergistic" (Razavi & Miller, 1995:14).

Different terminology also began to provide clarification shifting from 'woman' to 'women' and from looking only at 'women's' roles to look the social construction of 'gender' roles by widening the scope of analysis to include class, race, age, etc . The terminology transition was not however uncontested. For example, there was a perceived loss of emphasis on women, with too much importance on men, resulting in stratified programme implementations (Reeves & Baden, 2000). On the other hand, concerns were aired that the increased focus on women would circumvent full exploration of gender relations (Reeves & Baden, 2000). The shift of the focal lens to gender relations did, however, provide opportunities to explore both the private and

public spheres of men and women (Marshall, 2000; Chant, 2003; Beetham & Demetriades, 2007).

Even with the advent of increased scrutiny on gender behaviours within development, WAD approaches had serious limitations. Primarily, the limitations were due to their continued emphasis on the productive part of women's lives as part of the labour market. This meant women were being offered opportunities to participate in income-generating activities without accounting for their already extensive reproductive responsibilities of child-bearing, rearing and household management (Rathgeber, 1990; Moser, 1993). Ushered in was a more rounded understanding of gender roles, tasks and time burdens, referred to as the Gender and Development (GAD) approach. This new understanding provided a more balanced economic and political analysis which also included insights on the social and cultural dynamics (Rathgeber, 1990).

4.6.3 Feminist Discourses: Influences on Gender and Development

The GAD paradigm for gender equality that evolved in the late 1980s was shaped by a multitude of vocal and influential sources. First, as already stated, lessons were garnered from WID and WAD practices. Second, two significant social theories arose: feminist social theory (e.g. Simone de Beauvoir, Judith Butler, Patricia Hill Collins, Dorothy Smith) and feminist political theory (e.g. Sandra Harding, John Stuart Mill, Iris Young). Both experienced significant shifts during the 1990s instigated by heated debates in the broader feminist discourses between global South and North academics, feminists and practitioners. Feminist social theory sought to understand the essential inequalities between women and men with a lens on subjugation (Jackson, 1998). Feminist political theory no longer accepted the current or historical underrepresentation of women's equality within the political world; it sought to reconstruct new practices and organisations to change the status quo (Frazer, 1998; Jackson, 1998).

Social feminist theory was represented by a multitude of philosophers', some who were feminists, some who were not (Jaquette, 1982; McLaughlin, 2003). Leading up to the 1980s, the primary feminist agendas were rooted in social theory (i.e. liberal, social and radical) and initially could be seen as having some alignment in their political agendas even though the approaches were distinct (Barrett & Phillips, 1992). Socialism has a vast range of theorists including Germans Karl Marx (1818-1833), Friedrich Engels (1820-1895) and Clara Zetkin (1857-1933), British William Thompson (1775-1834), American Charlotte Perkins Gilman (1860-1935), and Russian Alexandra Killontai (1873-1952). Despite stark differences²², they believed generally that unhindered capitalism was oppressive of working class people and that a more collective system where everyone benefited equally in terms of the distribution of societal wealth and resources was both achievable and appropriate (Bryson, 1999). For example, Marx's concept called "historical materialism" underscored the belief that to survive as human beings over generations, both sexes had to have equal opportunity to participate fully in an economic society by producing and reproducing the requisite material requirements needed to live and the associated relationships or "production relations" (Collier, 2004). Marx stated, as quoted in Collier (2004):

"The mode of production of material life conditions the social, political and intellectual life process in general. It is not the consciousness of men that determine their being, but, on the contrary, their social being that determines their consciousness" (Collier, 2004:15).

For some social feminists these ideals supported their stance on equal rights and opportunities for all women, and not just for the elite, as a way of marching towards economic freedom (Bryson, 1999). Consequently, this collaborative march would ultimately surface gender disadvantages in society without relegating the lack of an

²² Marx however is not credited as a feminist considering the oppression of women as a product of society and secondary to class subordination. He did not recognise women's unpaid labour as noteworthy, while many other philosophers listed above saw the issue of the subordination of women as a central one (Bryson, 2003)

individual's progress to personal ineffectiveness. Socialist discourses, deeply debated in feminist literature during the second wave of feminist movements, offered several compelling ideas that supported feminism and have subsequently shaped the GAD approach; for example, the belief that family, relationships and social orders are not preordained but are shaped by historical contexts. They therefore are not static and are able to be changed (Bryson, 1999). Significantly, the linking of a materialistic economy guided by patriarchal politics affected women's status in all segments of their lives at the national, community and household levels and was reinforced by historical and current values and cultural norms (Sen & Grown, 1988). Women's control over their private and public spheres needed to be increased (Connelly et al., 2000). Finally, one discourse that underscores the GAD approach of conducting work burden analyses in development projects is that women and men are equally capable of completing any task, for equal pay. The gender roles associated with certain tasks and responsibilities *can* shift such as men being primary childcare providers and women doing physically demanding work, essentially creating a more equal distribution of labour (Bryson, 1999; 2003). Theoretically, this collective reorganisation of labour and providing equal pay in the public and private spheres tasks for women and men doing similar work, could go a long way in reshaping the full economic independence for both genders. Yet practically, inequitable distribution of labour has proved resilient from a systems perspective. What is required is a complete dismantling of the deeply established patriarchal societies and a paradigm shift regarding labour relations

Feminist political theory has also been influential on the way development aid was administered, prioritised, and delivered championed by a long list of women activists who were committed to the education of women, the fight for voting rights, demanding civil rights and human rights (Wollstonecraft, 1792; de Beauvoir, 1949; Firestone, 1970; Joseph & Davis, 1983; Greer, 1984; Lerner, 1986; Hooks, 1992; Steinem, 1995; Plumwood, 1996; Butler, 1997; Friedan & O'Farrell, 1997). These activists sought to change not only the legislation and administration within political structures, for these are socially constructed and therefore 'prescriptive' in that they dictate how society should organise

itself. They also sought to fundamentally redefine the relationships between the governance, societal phenomena and the values that continued to marginalise or ignore women (Frazer, 1998). A key argument within this political theory was that the prevailing governance models were not just marginalising women, but were actually anti-women. One specific debate, that has relevance within a development context, is the presumption that political structures are in essence 'legitimate' and therefore, are able to enact agreements, contracts and pacts between parties who theoretically have equal access and status with power (Frazer, 1998). Yet problematically, the access to political power and decision-making has historically and primarily been afforded to men, essentially limiting or excluding women from making these types of contracts (Frazer, 1998).

Along with the prominent influences of social and political feminist theories on gender equality practices in development policy, there was vocal concern from non-white women in both the North and the South who felt the discourses were not representative of their specific interests, needs and concerns (Crenshaw, 1989; Collins, 1991; Behrendt, 1993).

4.7 Gender and Development Approach (1990s onwards)

It was the demand for diverse ideas from pluralistic voices that mobilised GAD during the 1990s onwards. The pressure was generated from women, feminists and organisations in the global South demanding that research and analysis be derived from, and grounded in, the local context versus originating from the North by empathetic, nevertheless, external actors. At issue, paralleling arguments within the broader feminist literature, these pluralistic voices protested that current analysis practices were too homogeneous (Momsen, 2010). The concerns were that not enough was understood about the impact of women's oppression based on differences and multiple identities formed by class, ethnicity, marital status and race within development approaches (Momsen, 2010). Later, this list was expanded to include sexuality, disability, faith and age (Walby, 2005). Previously, the subtleties and

distinctions of women's lives and experiences were blurred by homogeneity, suggesting that if one programme worked for a group of women in a village, there would be similar needs or interests in nearby villages, cities and countries (Momsen, 2010).

Acknowledging the distinctions between the material circumstances of women's lives also meant that a comprehensive re-examination of deeply held foundational and hidden assumptions within development programmes was essential, for many were vehicles of inadvertent oppression. Researchers from the South increased their research contributions in an attempt to balance the discourse while providing a more authentic historical context (Barriteau, 2000). Organisations like Development Alternatives with Women (DAWN) provided analysis, strong critique and monitoring of the impact of economic globalisation and trade liberalisation that impact women of the South (Barriteau, 2000). DAWN used this information to partner with, and influence, other networks and institutions, demanding greater input and accountability by the World Bank, International Monetary Fund, United Nations (UN) and the World Trade Organisation (Development Alternatives with Women for a New Era, 2015).

Building on WID, WAD and activism within the broader feminist movement, three GAD themes emerged that began to shape development efforts, driving organisational and programmatic changes. First, emerging from the political feminist ideal, was acknowledging women as 'agents of change' in their own lives and not merely passive recipients of development. Although being politically and socially active in driving change was widely acknowledged in the North, dating back to the suffragette efforts in Australia, the U.K. and U.S.A., practices in development efforts were seen as imposed, doing things 'to' women and not 'with' women. Women began to demand a more participatory role in organising the support they wanted and needed (Momsen, 2010). In Latin America, for example, political systems began to be exposed to more gendered discussions (e.g. domestic abuse) with more women participating in political decision-making at the community, regional and even national levels (Craske, 2003).

A second GAD theme acknowledged that countries and cultural proclivities aside, both women and men suffer from oppression that locks them into poverty. Most societies have unmistakable roles and division of labour by sex; labour is divided and what is considered a male or female task varies (Momsen, 2010). Gendered roles notwithstanding, globally women juggle three primary roles: reproduction, community management and production (March et al., 1999; Momsen, 2010). In the aggregate, the combined roles of reproduction and community management are multi-faceted and time consuming, typically unpaid, and therefore socially undervalued (March et al., 1999; Momsen, 2010). Most pointedly, this triple burden constrains women's opportunities to participate in the paid market economy.

Work performed in the private sphere or in households was commonly referred to as the 'reproductive role', which had two primary elements, biological and social (March et al., 1999; Momsen, 2010). From the biological perspective, only women can be pregnant, give birth and biologically nurse children. Beyond those biological responsibilities there are also the sociological care and maintenance of children and relatives, cooking, household, and caring for the sick. While either gender could conduct these daily tasks, they are primarily conducted by women (March et al., 1999; Momsen, 2010). In rural communities, these duties could be considerably more time-consuming than work conducted in the public sphere (March et al., 1999; Momsen, 2010). Chores include tasks like fetching water and fuel at great distances, milking or slaughtering livestock and dealing with erratic or no electricity (Momsen, 2010; Chant, 2012). And even after a focused spotlight on the issue over the past few decades the reality remains: "rigorous evidence confirming that the burden of care work falls disproportionately on women. They have documented the negative impact of care work on labour market involvement, productivity, economic growth, and gender equality" (Sepúlveda Carmona & Donald, 2014:443). In some developing countries, there is a level of low cost or free state support that can reduce the workload. This type of support, however, is often not available, severely curtailed

through economic constriction or too hard to access for rural communities (Connelly et al., 2000).

Increased attention to women's unpaid reproductive work necessitated creating some baseline statistics. As part of the 1995 Beijing Platform for Action, member countries were encouraged to capture the estimated value of non-paid work and to include those values in official economic activities (Duggan, 2011). It was clear that the social or community management role played by women was an essential survival strategy (Momsen, 2010). Women also created other family support structures relying on the sharing of resources or receiving support from the relationships they nurtured while participating in community events, religious or ceremonial activities and other social obligations (Momsen, 2010). Additionally, studies indicated that the community activities in which women participated had a psychological benefit by building friendships, increasing self-esteem and well-being, moreover, such activities could earn them and their families a higher status in the community and potentially lead to leadership opportunities (March et al., 1999).

As noted earlier, experience during the WID/WAD approaches showed that integrating women into existing programmes was ineffective, superficial and tokenistic. What also was apparent was the intricacy of women's lives and that the impact of poverty on them was diverse and distinct, requiring a more holistic analysis. Gender planning and analysis needed to reach beyond historical assumptions that women had similar needs and concerns to each other or to women in other cultures. Gender planning and analysis needed to critically examine culturally-constructed relationships between women and men. Attention needed to be given to each gender's time-burdens within the private and public spheres of their lives. This more refined lens would allow for 'gender' to be not merely an 'add on' to existing projects, but instead, this shift in paradigms led to transformed policy programmes through an approach called 'gender mainstreaming' (Hopper, 2012).

4.7.1 Gender Mainstreaming: Swimming Upstream

The advent of gender mainstreaming in the 1990s was the framework that ushered in a shift in planning, designing, implementing and evaluating. Although not the only approach to tackling gender equality, the use of gender mainstreaming as a primary strategy to achieve gender equality is still germane today, 21 years later in 2016. The use of gender mainstreaming has spread beyond the global development sector and can now be seen used in a broad range of disciplines such as in 'environment mainstreaming', 'HIV/AIDS mainstreaming' and 'human rights mainstreaming' (Charlesworth, 2005).

This major global strategy of gender mainstreaming entered the development lexicon leading up to the Beijing (China) Platform for Action. It was codified during the Fourth United Nations World Conference in 1995:

“Mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality” (United Nations, 1997:2).

This ambitious agreement, and the explicit commitment to work at multiple levels of any given system to create gender equality, has in some ways allowed for clarity of purpose, has shaped programmes and policies and has increased decision-making and leadership opportunities (Daly, 2005). And yet ten years after its global adoption, results still were disappointing:

“Although it has not been difficult to encourage the adoption of the vocabulary of mainstreaming, there is little evidence of monitoring or follow-up. A consistent problem

for all the organizations that have adopted gender mainstreaming is the translation of the commitment into action. Progress is variable and there are signs of gender mainstreaming fatigue within the U.N., caused by a lack of adequate training and support” (Charlesworth, 2005:11).

After 25 years, gender mainstreaming is still the dominant development strategy for equality within GAD intended to provide governments and organisations strategies responsive to women and to lessen male bias (Elson, 1995b; Sweetman, 2012). To achieve this, a process referred to as agenda-setting was implemented as a way to review development goals and programmes, political, economic and social structures. It was not only a tactic that required incorporating women’s and men’s concerns, voices, viewpoints and interests as integral elements to all phases of a project, but also it required deeper analyses of the symbiotic socially constructed gender relationships between men and women (Derbyshire, 2002).

According to Derbyshire’s (2002) guide for policy makers and practitioners, gender mainstreaming contains four key steps. I regard this as an exemplary resource for it represents seven years of academic and practical experience. Additionally, it was authored by a gender specialist with broad experience in the development of gender policies and strategies. Another reason for selecting this as a baseline document is that Derbyshire has since written a critique of gender mainstreaming (Derbyshire, 2012).

Derbyshire stated, in a guide section called “Mainstreaming Gender in a Nutshell”, that the first essential step is to disaggregate data and analyse using a gendered lens (2002:11). This data gathering step requires regularly looking at women’s, as well as men’s, experiences, needs and main concerns and subsequently studying the results, looking for issues, information or programmatic gaps (Derbyshire, 2002). This data and analysis must then inform, and be used to monitor, ongoing and future decisions about policy and programmes. The second essential step concerns participatory decision-making. Both women and men need to be encouraged to be involved. They need to be

provided with capacity development, i.e. how to get their opinions and concerns received and integrated (Derbyshire, 2002). Third, actions taken must be contextualised and reflect the information gleaned from the gendered data analysis. The contextualised and reflective information then is used in formulating and supporting policies, projects, staffing, budgets and evaluations, looking for specific 'indicators of change' (Derbyshire, 2002:11). Finally, the fourth key step involves the change management process which needs to be reinforced by capacity development for management and programme staff. Additionally, I believe the same needs to be done for the women and men who are participating in the programme. It is not an inherent skill to implement lasting social change, so it requires ongoing development with sufficient allocation of resources and monitored for indicators of change (Derbyshire, 2002).

Mainstreaming efforts have seen some success facilitating gender discourses within development institutions, increasing allotted resources, increasing focus on staff development and policy production (Cornwall et al., 2007). Some see the adoption of mainstreaming as extensive: "almost all international development organisations and governments have adopted mainstreaming in some form" (Derbyshire, 2012:406), mostly with modest success. Diagnosis of its progress and sustainability remain ambiguous. Many problems have been tackled; some more successfully than others. Some institutions have worked to develop protocols and policies to mitigate perceived 'male bias' within development (Elson, 1995b). A gendered Bolivian law, intended to increase women's access to local politics, was enacted (Clisby, 2005). Government offices in Laos, Cambodia and Thailand have addressed gender issues (Kusakabe, 2005). Additionally, issues of women's safety as part of safer cities research, policy and practice have been considered (Moser, 2012).

The idea of mainstreaming any concept into a system necessitates a fairly comprehensive understanding (although one can never completely know any system) of what the current situation is. As with previous learning curves that occurred within gender development theory, there have been significant shifts as to what constitutes a gender analysis. Clarifying that women are not the problem has been a focus. The

problem was, and continues to be, the subordination of women within gender relations (Elson, 1995a; Jackson & Pearson, 1998):

“...the extension of analysis from issues which were clearly concerned with women’s reproductive roles (health, family planning, education), through economic roles (employment, income generation, household budgeting) to generic issues of macro-economic planning, structural adjustment and debt, environmental degradation and conservation and civil and political organisation which are clearly of general rather than sectoral relevance” (Jackson & Pearson, 1998:5).

As mentioned earlier in this chapter, socialist theory influenced feminism and as a result, also had great impact on GAD. A principal way in which feminist ideals leaned on feminist socialist arguments to shape GAD was by taking a holistic understanding of the gendered interdependencies of the economic and social spheres within a culture. Gender analysis practices moved away from looking solely at women’s roles within the family toward understanding women’s complex relationship with employment. Practices of gender planning utilising gender analysis have emerged. They are used extensively in development projects seeking to assess the relationships between politics, economics and social elements to gender roles within organisations, policies and programmes (Connelly et al., 2000). Researchers pursued the collection and disaggregation of data using qualitative and quantitative analysis, ‘mixed methods’, to understand the diversity of women’s and men’s experiences and backgrounds. Researchers thus began to create clear links and relationships between the reproductive, community and productive roles of women’s lives (Jayaratne & Stewart, 1991).

According to Bamberger, et al (2002), gender metrics were gathered via activities, methods and practices for a number of reasons. First, during the design and implementations stages, this ensures that activities or programmes are not marginalising women or men. Secondly, they help to identify areas of priority. Third, the results can be used to evaluate whether resources have been allocated equitably. Fourth, they are used to build capacity, create discourse and understanding, while

increasing the commitment of staff and participants (Bamberger et al., 2002).

Conducting analyses helps to clarify dimensions of pervasive poverty based on gender and other factors, thus exposing women's levels of discrimination potentially not faced by their male counterparts. Beetham's and Demetriades' work best describes the potential pitfalls of not conducting a conscious gender analysis: "...development research that ignores the complex aspects of gender relations results in incomplete and/or biased research, which in turn leads to the formulation of incomplete development policies and programmes" (2007:1).

Yet the practice of gender metrics and gender mainstreaming in general is also seen as driving the neo-liberal discourse of 'smart' economics (Davids et al., 2014). The domination of development language that focuses on "effectiveness, efficiency, impact assessment and 'smart' economics" suggests women are vehicles to strengthen the economic growth and reduce poverty (Davids et al., 2014:401). Chant and Sweetman (2012:521) indicated that smart economics:

"...seeks to use women and girls to fix the world, although research indicates that for women in poor households and communities, a win-win scenario, in which poverty is alleviated, economic growth assured and gender equality attained, is very far from the truth".

In many ways the use of the GAD approach, which today is synonymous with gender mainstreaming (planning and analysis), has proven to be rich in discourses, but the real changes to women's lives have been less fruitful (Derbyshire, 2002; Kloosterman et al., 2012; Mannell, 2012; Sweetman, 2012). As noted in this section, the debates on gender mainstreaming's impact are ongoing and divided. The creation of inequality between women and men has had centuries to mature and formulate beyond cultural norms and it is now instituted in almost every societal structure (e.g. law, education, politics) that guides countries and their citizens.

Reflecting on my literature review alongside my consulting experiences, global development work is frequently labelled as being 'systematic' (Chant & Sweetman, 2012) as a way to implement policies methodically. The drawback to a systematic approach is that although it can provide some assurance that interventions are done in a way that makes them easier to report on and even replicate because of their specific processes, the prescriptive nature of its process may also miss any potential "messiness" and limit innovation to deal with intractable problems that are inherent in many development projects. Systems that are considered 'messes' have high levels of uncertainty about how to conceptualize or intervene, they have no obvious or single solution. What I suggest is that implementation strategies also need to be 'systemic'. The pairing of systematic and systemic approaches to an intervention provides the opportunity for documenting what has been done within an intervention while critically reflecting on the component parts of a system and its whole, trying to obtain a comprehensive understanding and simultaneously acknowledging that such a complete picture is impossible (Midgley, 2000).

4.7.2 Systemic vs Systematic

Some of the GAD literature suggests taking a *systematic* gendered approach to analysing contexts as an entry point for designing culturally appropriate programmes and policies. By being methodical there is an increased opportunity to gain a more thorough understanding of the complexities of how women and men experience poverty and inequality (Reeves & Baden, 2000; Bamberger et al., 2002; Esplen & Jolly, 2006). Undertaking an analysis in a systematic way implies a thorough, predictable, and controlled process which is essentially reproducible but may not consider all the interactive parts of the system and stakeholders (Kaufman, 2012). This reductionist approach also has the potential to miss valuable information, for it does not allow for deviations from process and also is not receptive to emergent information which is typical of most development projects. The idea of being systematic and able to replicate an analytical process from project to project, country to country, is compelling. From Sen's and Grown's (1988) perspective, "improving women's opportunities requires

long-term systematic strategies aimed at challenging prevailing structures and building accountability of governments to people for their decisions” (82). But being analytical has proven to not be enough. For instance, consider the disappointing results of gender mainstreaming which took a systematic approach to achieve gender equality by “internalising gender into every stage of every policy process, and inside every policy domain...consider (Bock, 2014:732). Taking a tested analysis process into different contexts also necessitates a greater understanding of each individual ‘system’ and its internal and external relationships, which suggests taking a systemic approach.

For clarity, systematic implies a prescriptive set of stages in an invariant manner, while systemic implies looking not only at the individual parts, but the complex web (linear and non-linear) of their relationships to each other (Ison, 2010). A criticism of some of the GAD literature is the frequency in which I noticed the term ‘systematic’ approach to gender mainstreaming, with few tackling the need for being ‘systemic’ (Williams et al., 2004; Verloo, 2005; Walby, 2005). A United Nations Gender Mainstreaming document from 1997, provides a good example of the need for a systematic use of gender data and then systemically incorporating those views into committee work. It stated that:

“To strengthen capacities for the collection, evaluation and exchange of gender-related information, a coordinated, *system-* wide effort under the leadership of the main coordinators for specific areas is needed for the development and *systematic* usage of, inter alia:

- (a) Gender-disaggregated statistics and indicators;
- (b) Proposals for treaty bodies and States on how to use statistics, including gender-disaggregated data, in reporting on and monitoring all relevant treaties in order to integrate a gender perspective;
- (c) Non-numerical indicators to monitor gender mainstreaming;

In the ongoing reform process within the United Nations system, inter alia, in the work of the executive committees, the *systemic* integration of a gender perspective should be ensured” (United Nations, 1997:7, emphasis added).

Consider Moser (1989) who stated:

“Until recently, structural adjustment [programmes] (SAP) has been seen as an economic issue, and evaluated in economic terms (Cornia et al., 1987). Although documentation regarding its social costs is still *unsystematic*, it does reveal a serious deterioration in living conditions of low-income populations resulting from a decline in income levels.”(Moser, 1989:1814, emphasis added).

The systematic or methodical tracking of social costs can at times prove helpful, allowing for best practices to be replicated based on previous experiences. However, might a systemic or more inclusive method better illustrate the complexity of SAPs?

As a branch of the much broader systems field, CST and Feminist Systems Thinking advocate a *systemic* approach. Being systemic infers conducting a deep examination preceding any given project using socially constructed critical reflections or boundary analysis (e.g. who and what should be included, who will be impacted, power relations) in order to design a contextualised response utilizing a variety of theoretical and methodological resources in an attempt to improve any given situation (Midgley & Pinzón, 2013; Stephens, 2013a). The term ‘systemic’ makes an adjective out of the noun ‘system’, and implies that the reflective practice mentioned above can organise elements of a system of relationships in such a way that perceived changes could emerge. It is the consideration of boundaries, relationships, perspectives and emergence that makes something systemic (Midgley, 2000).

Emergent outcomes’ unpredictability requires that practitioners, funders, policy makers, etc. have to be willing and prepared to take risks. Often these actors feel constrained by organisational goals, government funding, societal norms, etc. and are not comfortable taking the risk that may be required to acknowledge, let alone respond to the emergent nature of an intervention. Still,

conducting a systemic intervention practice means trusting the process and letting the stakeholders guide the work as a way of democratising potential changes in their system. The tension that can arise is that even though gender equality is considered a human right by many, others may not necessarily agree.

It could be debated that GAD efforts, as described earlier in this chapter, albeit often implying a systematic approach, are actually also being systemic when they conduct a gender analysis; however it often is not identified as such. From my perspective, if the intent is to take a systematic approach to integrate gender into a system, there first needs to be a better understanding of the relevant values. This then allows for the construction of a formulaic intervention to be undertaken systematically using a systemic approach and therefore both strategies are activated in relationship to each other. This is why, for example, systematic tick box exercises for assessing a person’s health status can be potentially dangerous. The assumption is that all the categories of health risk are understood and so a tick box list is useful yet it also short-circuits thinking about possible unfamiliar symptoms (Ison, 2010).

Understanding both these terms, systemic and systematic, and how they might help illuminate activities that are distinct, relevant, and play a complementary role in strengthening efforts of gender equality will be helpful. In his book on systems science Ison (2010) goes into great detail distinguishing ‘systematic’ vs ‘systemic’ thinking and action as presented in Table 4.1 below.

Table 4-1 - Characteristics of Systemic Thinking versus Systematic Thinking
(Ison, 2010: p.192)

Systemic thinking	Systematic thinking
Properties of the whole are said to emerge from their parts	The whole can be understood by considering just the parts through linear cause-effect mechanisms
Boundaries of systems are determined by the perspectives of those who participate in formulating them.	Systems exist as concrete entities; there is a one-to-one correspondence between the description and the described phenomenon

Individuals hold partial perspectives of the whole situations; when combined, these provide multiple partial perspectives	Perspective is not important
Systems are characterised by feedback; may be negative...or positive...	Systems are comprised of chains of cause-effect relationships
Systems cannot be understood by analysis of the component parts. The properties of the parts are not intrinsic properties, but can be understood only within the context of the larger whole through studying the interconnections	A situation can be understood by step-by-step analysis followed by evaluation and repetitions of the original analysis
Concentrates on basic principles of organisation	Concentrates on basic building blocks
Systems are seen as nested within other systems they are multi-layered and both intersect and interconnect to form networks	Systems are hierarchically organised
Is contextual in approach	Is analytical in approach
Concerned mainly with process	Concerned mainly with entities and properties
The properties of the whole systems are destroyed when the system is dissected, either physically or theoretically, into isolated elements	The system can be reconstructed after studying the components
Systemic action ²³	Systematic action
The espoused role and the action of the decision-maker is very much part of an interacting ecology of systems. How the researcher perceives the situation is critical to the system being studied. The role is that of participant-conceptualiser.	The espoused role of the decision-maker is that of participant observer. In practice, however, the decision-maker claims to be objective and thus remains 'outside' the system being studied.
Ethics are perceived as being multi-faced as are the perceptions of systems themselves. What might be good from one perspective might be bad at another. Responsibility replaces objectivity	Ethics and values are not addressed as a central theme. They are not integrated into the change process; the researcher takes an objective stance
It is the specification of a system of interest and the interaction of the system with its context that is the main focus of exploration and change	The system being studied is seen as inherently distinct from its environment. It may be spoken of in open-system terms but intervention is performed as

²³ Word systemic added to resolve typo in original document (Ison, 2010:192)

	though it were a closed system
Perception and action are based on experience in the world, especially on the experience of patterns that connect entities and the meaning generated by viewing events in their contexts	Perception and action are based on a belief in a 'real world', a world of discreet entities that have meaning in, and of themselves
These is an attempt to stand back and explore the traditions of understanding in which the practitioner is immersed	Traditions of understanding may not be questioned although the method of analysis may be evaluated

According to Ison's (2010) descriptors above, he makes a case for being both systematic and systemic in his practice, indicating that being solely systematic is an "inherently conservative" approach while using both approaches "builds a powerful repertoire for the juggling the M-ball (i.e. management of the situation)" (191). The use of systemic thinking encourages a critical and holistic (as much as possible) analysis of the opportunities, constraints, and relationships of a project. A systemic approach welcomes different stakeholder perspectives, providing an expanded context for a systematic analysis (Ison, 2010).

I do not mean to minimize the complexity of development projects or to value being systemic at the cost of systematic approaches, particularly when applying these approaches to gender mainstreaming to combat something as historically and culturally entrenched as gender equality. I believe there is an opportunity for future research using elements of systematic analysis that could be coordinated across hierarchical levels and to have a more robust systematic intervention.

4.7.3 Gender Mainstreaming: is It Working?

As gender mainstreaming theories travel throughout the research and practitioner landscape, they take on new meanings and interpretations resulting in a conflated and bumpy road of definitions, implementation, monitoring and impact strategies that continue to hamper efforts. These emergent qualities of

gender mainstreaming make efforts for fundamental change and demarcations of success all the more difficult to document (Derbyshire, 2012). GAD and gender mainstreaming are still seen as the dominant approaches in development shaping fundamental re-analysis of gender roles, providing insight to theoretical discussions, bringing gender equality into mainstream vernacular and being implemented in many organisations and programmes (Milward et al., 2015). At the same time GAD and gender mainstreaming have received criticism from theoretical, policy, implementation and evaluation standpoints (Rathgeber, 1990; Razavi & Miller, 1995; Kabeer, 2003; Daly, 2005; Dawson, 2005; Kloosterman et al., 2012; Milward et al., 2015). In the decades since Beijing's 1995 Platform for Change Conference, the adoption of gender mainstreaming has been a global imperative. It was adopted by most of the global organisations including the European Union, the World Bank, United Nations agencies (e.g. UN Development Programme, UN Women), Organisation for Security and Cooperation in Europe, local NGOs, etc. (Hafner-Burton & Pollack, 2002).

There are several perspectives from which to understand the challenges of gender mainstreaming, whether efforts are "integrationist" or "agenda-setting" in nature, or where the changes are done at the "institutional" or "operational" levels or both (Jahan, 1995:13). From an integrationist perspective, the purpose would be to include activities and analysis focused on women within existing paradigms and programmes, but not necessarily addressing the structural or organisational constraints nor making women's rights the key issue (Jahan, 1995). Although the most practical way to implement, the limited results of the integrationist approach were widely attributed to failures in overcoming cultural norms and attitudes regarding women's roles. In some cases the existing designs, goals and objectives of the development programmes themselves were not flexible enough to readily include equality as a component (Sen & Grown, 1988).

In agenda-setting, which many researchers, feminists and NGOs supported as the *only* way that real equality (Jahan, 1995; Squires, 2005) could be achieved

and sustained, the primary focus is on women's rights (Jahan, 1995). One reason agenda-setting is more effective is that women themselves join the mainstream discourse (Jahan, 1995). They therefore can redefine the concept of the mainstream by being integral decision-makers in the design and implementation of projects (Jahan, 1995). Whether integrating or setting the agenda, it is suggested that both strategies are needed, becoming part of the agenda and then driving the agenda forward. Yet there remains evidence that regardless of the strategies within gender mainstream that are prioritised, the results are underwhelming (Davids et al., 2014; Parpart, 2014; Milward et al., 2015).

From an implementation or operational standpoint, most of the success of gender mainstreaming has been the inclusion of equality within internal institutional structures through changes to their practices, policies, structures, staffing, boards and procedures (Porter & Sweetman, 2005a). These advances are noteworthy, for they begin to increase women's representation. Through their increased presence and voice, women are more influential in having gender concerns addressed (Porter & Sweetman, 2005a). This is relatively good news in that organisations have to change the *way* they organise themselves in order to influence *how* they operationalise equality into their work.

Yet the valid critiques remain. The overall social reform results that should have transpired after more than two decades of efforts seeking significant paradigm shifts are rather limited considering the collective social and economic investment. The subtle barriers that stop women gaining access to the structures and systems established by, and for, male hegemonic rule still exist. The concern is that the changes that have occurred let *some* women in, and such thinking will never produce societal change required to overcome widespread gendered inequality.

The overarching hope for GAD supporters 25 years ago was that gender mainstreaming would be the conduit for substantial, systemic social change.

What has ensued is an assortment of smaller, surface changes with only incremental progress being made towards the deeper changes that would have the most impact on women. Below is a list, by no means comprehensive, of areas where work still needs to be done.

4.7.3.1 Policies

In principle, gender mainstreaming has sought to affect the whole development hierarchy or system as a means of leveraging and driving social change. In its defence, gender mainstreaming has managed to achieve some organisational level changes and has even been integrated into language at the policy level (Ericson, 2015). Acknowledging that all efforts to address gender equality within any society have a political component, significant hurdles remain and critiques proliferate.

At the macro policy level, the ideals of gender equality and social justice are still having to operate in environments that are not open to change or even hostile to it. At the mezzo-level the reduction of funds and weak organisational infrastructures have resulted in fragmented commitments, strategies and programmes (Rao & Kelleher, 2005). At the micro-level, development objectives are embedded in the third Millennium Development Goals (MDGs)²⁴ of “promote gender equality and empower women”, targeting the elimination of “gender disparity in primary and secondary education”(United Nations, 2013). This goal has been criticised, on the one hand, as being too narrow and, on the other hand, as having an expansive wish list and an aggressive timeline (Kabeer, 2005).

Over the decades, evaluations of gender mainstreaming efforts indicate that policy evaporation, as mentioned in the Chapter One, is most evident during planning and implementation resulting in limited impact on culture and social

²⁴ “The MDGs, created in 2000 and agreed to by the majority of the world’s countries and international development organisations were seen as a blue print to galvanise efforts to meet the needs of the world’s poorest populations by 2015 (Nayyar, 2012).

structures in which men and women live (Derbyshire, 2012). From my field experiences, the evaporation is represented by missed opportunities and access to resources for women. Technical staff (e.g. agricultural technicians) who are responsible for recruiting rural farmers for funded projects often hold meetings at times and locations not convenient for women to attend due to their private sphere responsibilities. These decisions made by the technicians did not seem intentional as a way to exclude women, they just usually neglected to consult the women in the villages about what would be a convenient time for them to attend. Gender mainstreaming's critics acknowledge that in many influential global development institutions, such as the World Bank and UNDP, there have been changes integrated into policies, personnel and procedures, but that a 'watered down' agenda-setting approach is in effect and observable in their stated missions and goals (Pearson, 2000; Hafner-Burton & Pollack, 2002; Jacquot, 2010).

4.7.3.2 Programmes

When organisations first began to implement gender mainstreaming they found it cumbersome to translate into actual policy change in practice, programmes, social structures, institutions and policies. The changes required a level of commitment from people, organisations and countries, to address the clearly identified gender inequalities. Comprehensive change, however, has been slow to evolve and difficult to guide.

In a regional operational example from South America, gender equality needed to be explicitly included with quantifiable indicators within a region's strategic plan. This could then be tied to staff performance objectives and development plans as a means to reinforce that gender equality is a central part of their accountabilities (Dawson, 2005). Largely, even when institutional and organisational changes have been made, and anecdotal evidence is available, it is difficult to attribute changes in women's poverty levels or gender relations to gender mainstreaming programming (Sweetman, 2012).

Attaining social transformation was the highly anticipated outcome of adopting gender mainstreaming (Parpart, 2014). An early challenge was developing, adapting, and utilising effective tools to measure improvement with precision, suggesting that what was needed was procedures on how to implement across policy processes; operational outputs from organisations measuring changes to policies, programmes, and projects; and most challenging, documenting implementation outcomes from the field in different contexts (Hafner-Burton & Pollack, 2002). From a Pearson's (2000) feminist standpoint gender mainstreaming is criticised as a protectionist tact used by development agencies to support their status quo.

As noted in this chapter, a lot of knowledge has grown out of trial, error and analysis within GAD, predicated on the ideal of having a gender equitable society (Rathgeber, 1990). The multiple organisational layers and pluralistic human actors add to the complexity of shifting normative behaviours and beliefs about gender. The pace however is excruciatingly slow, particularly those that are constrained by generations of poverty.

Yet, when I consider what has already been accomplished to improve people's lives using GAD and CST, both fields committed separately to social change, I see progress and opportunities. Within GAD there are ways in which its current 'systematic' approach could be more 'systemic', informed by the Feminist Systems Thinking (Stephens, 2013a) framework which has emancipatory principles at its core.

4.8 Research Aim and Questions

Using capacity development and participatory practices, my aim was to create and test a new method which would adapt and further improve Stephens' (2013a) Feminist Systems Thinking theoretical framework into a culturally-relevant analysis that has the potential to be transferred to other contexts by individuals or organisations.

My systemic intervention explored three research questions:

1. Primarily, how can Stephens' (2013a) Feminist Systems Thinking ethical framework be further advanced in a culturally relevant way to support people in a development context?
2. Second, what are the strengths and weaknesses of Feminist Systems Thinking within a global development context such as Nicaragua?
3. Third, what needs to change within the Feminist Systems Thinking framework to transition from a theoretical process into an intervention tool for practitioners and rural entrepreneurs, while still valuing its original ethical underpinnings?

This research seeks to contribute to both CST and GAD by adding to the critical debate around social improvement, which both fields have identified as a central theme and therefore of utmost importance (Midgley, 2000; Kerr, 2002). Similarly, both fields prioritise empowerment and/or emancipation as a key strategy to achieve systemic improvement, and as a means to liberate stakeholders from oppression by attending to issues of power and coercion (formal and informal) through efforts of mutual understanding and dialogue (Midgley, 1996; Oliga, 1996; 2000; Hammond, 2003; Porter & Sweetman, 2005a; Momsen, 2010; Stephens, 2013a). While the idea of emancipation seems to have been less debated within CST, since Midgley (1996) argued that it is too narrow a concept, I am seeking to bring it back into focus.

4.9 Chapter Conclusion

The efforts to create a gender equality in development programmes have been extensive over the past 80 years. Trial and error has informed policies, but just as important has been the shift of “doing” equality to women to trying to understand the social construction of gender relations. The early efforts of modernisation and SAPs created by the global North ultimately marginalised a greater number of women and reducing their ability to become more independent wage earners by misguided economic policies.

The theoretical congruence of CST and GAD efforts during the 1990s to the present day demonstrates an increasing understanding of prioritising stakeholders' situations and contributions to a critical analysis of their own systems. While CST focused on improvement, it has neglected gender. GAD has focused on systematic analysis with little attention given to a systemic one as that proposed by Ison (2010). It is the intersection of those two bodies of experience and wisdom that informed fieldwork.

Chapter 5 Research Methodology and Design

My doctoral research, a systemic intervention, involved three months of research in two distinct countries and cultures: Washington, D.C. in the United States and Nicaragua in Central America. The purpose of this study, introduced in Chapter One, was to improve and contribute to two critical and analytical theories within Critical Systems Thinking (CST): Systemic Intervention (Midgley, 2000) and Feminist Systems Thinking (Stephens, 2013a) within a global development context.

This chapter develops a systemic intervention methodology by drawing parallels between critical systems thinking discussed in Chapter Three and gender and development theory reviewed in Chapter Four; both fields which informed my field work in Nicaragua. Typically, in many theses, the methodological decisions and the field work discussions are distinct, addressed in separate chapters. However, because of my adoption of a Midglean systemic intervention methodology (Midgley 2000), I have chosen to approach these two research topics, methodology and fieldwork, with a more symbiotic design.

Within this chapter I will review the primary methodology of systemic intervention (Section 5.1). Section 5.2 reviews the variety of methods I used, some of which are not traditional in a qualitative research (e.g. facilitation, workshops). Next in Section 5.3, I discuss the characteristics of objectivity and rigour within a systemic intervention guided by current systems thinking research. Section 5.4 will cover my role as a systemic intervention practitioner. Section 5.5 discusses practitioner biases and ethics that need to be considered and Section 5.6 reviews the legitimacy of conducting a systemic intervention. Finally, Section 5.7 summarises the methodology chapter and introduces my fieldwork, which is depicted in Chapter Six (phase one) in Washington, D.C.; Chapter Seven (phase two) and Chapter Eight (phase three) both of which took place in Nicaragua with different stakeholder groups.

5.1 Research Methodology – Systemic Intervention

Midgley (2000:103, emphasis original) has made many contributions to systems thinking but is primarily recognised for his work on systemic intervention, which:

“...refers to intervention that embodies pursuit of the ideal of comprehensiveness. As *absolute* comprehensiveness is impossible, an adequate methodology for systemic intervention must facilitate *considerations of issues of inclusion, exclusion and marginalisation* by promoting reflection on boundaries. It should also allow for theoretical and methodological pluralism.”

Systemic intervention can be differentiated from conventional scientific experimentation in that the former requires three central activities: critique, judgement and action (Barros-Castro et al., 2013). Critique involves reflection and discourse to consider and explore different perspectives, values and boundaries that are or could be represented in the intervention. Systems are everywhere and all around us, and we define them by naming their boundaries (See Chapter Three). How well we come to know them is thinking ‘systemically’ (see Chapter Four). Boundaries contain the ‘things’ such as material objects, people, and ideas. Boundaries may be perceived differently by different people, and so conflict may arise about where a system’s boundaries should be marked (Midgley, 2000). Ideally, the determination of boundaries is not a solitary process, but involves different stakeholder groups that are involved in or might be affected by the intervention (Ulrich, 1983). The influence and the role of the researcher and their values is also pivotal (Barros-Castro et al., 2013). Judgement, asks practitioners to bear in mind that using portions of methodologies/methods, mixing methods or creating new methods, still demands us to be mindful of maintaining a cohesive approach to a problem situation (Midgley, 2000; Barros-Castro et al., 2013). The point is: “The

interactive set of methods that emerges is usually different from (or more than) the sum of its parts” (Midgley, 2000:226). Finally, action requires the identification of potential leverage points for change and making a plan to prioritize and implement potential activities.

The nature of my systemic intervention was to identify, reflect, identify leverage points and ultimately strengthen gender equality policies and practices that exist (described in Chapter Six) in multiple overlapping organisational systems in two countries. The diversity of contexts and stakeholders included corporate headquarters and staff in the U.S.A; and in Nicaragua: country office and staff, agriculture sector partners and rural family businesses in poverty constrained regions. I reflected on the boundaries of the research, and made judgements about what stakeholders were essential to include in understanding the role of gender equality within each system and what was less relevant. The complex and flexible nature of the stakeholders and their potential problem contexts called for a pluralistic approach to methodologies and methods as a way of remaining responsive to emergent information and opportunities to support actionable change.

5.1.1 Methodological Pluralism

Burns (2007:32) argues that systems should be “seen as a way of thinking about human relations rather than as a map of reality” and “that each situation is unique and its transformative potential lies in the relationships between interconnected people and organisations”. It is the transformative quality and the interrelationships within a systemic intervention that drive the rationale for adopting a methodological pluralistic approach to my research. Midgley (2000:171) described a methodology as a “set of theoretical ideas that justifies the use of a particular method or methods”. He then argued for theoretical pluralism, maintaining, “if it is possible to have theoretical pluralism, then we should be able to *methodological* pluralism too: we can accept a plurality of

theories and flowing into methodology, and hence a wide variety of methods may be seen as legitimate” (2000:171).

In a systemic intervention examining challenges to smallholder women farmers in Ghana, Kwamina, et al. (2015) used a variety of hard and soft systems methodologies and methods (See Chapters Two and Three). The researchers’ use of a pluralistic approach explored potential constraints in women farmers’ access to resources using modelling, workshops, causal loop diagrams and literature review (Kwamina, et al., 2015). In another example of methodological pluralism within systemic interventions, Burns’ (2016) utilised action research, participatory practices, collective data analysis²⁵, interviewing, storytelling, systems mapping and participatory statistics within four development contexts in Bangladesh, India, Myanmar, and Nepal. According to Burns (2016: no pagination) when referring to his work in a development context with participatory processes, he “built on methodological pluralism combined with iterative methodological reflection...[which]demonstrated high levels of methodological rigour and analytical robustness, and are highly effective processes for generating impactful systemic intervention”.

Similarly, to Burns’ (2016) efforts my intent was to remain flexible and responsive to the contexts and stakeholders I was working with, building my intervention on iterative learnings. My methods, described below, were also varied; some that are traditionally used in qualitative research (e.g. interviews), some that are more commonly used in organisation development work which equally looks to support change.

5.2 Methods

Midgley (1997b) defines methodological pluralism as mixing methods from diverse sources. In many research projects there is more than one research

²⁵ Defined as by Burns (2016:n/a) as “stakeholders collectively explore how change is happening now (the dynamics of the systems that they identify) and how they think change might happen as a result of interventions into that dynamic system”.

question to be answered. Each research question can have a different purpose, not determined ahead of time, requiring different methods or parts of method as the intervention develops (Midgley, 1997b). Gaining an understanding of any systemic intervention, where to set the boundaries, what issues to include or exclude, what stakeholders need to be consulted or included, underscores the value of methodological/method pluralism as an important mind-set. It is not merely a matter of having more theories and methods to draw upon; it is essential to consider the coherence of those selections determining where they are coherent, and therefore suitable, to the situation or the problem being addressed (Petrović, 2015). Conducting a second order boundary judgement process as described in Chapter Three can help identify if the methods are appropriate for the task at hand. Changes can be made, preferably with input from the participants (Barros-Castro et al., 2013). Below are the methods used during the design phase of the intervention.

5.2.1 Field Notes & Recordings

A challenging part of any research that include field work is the practice of note-taking and not merely relying on recollection (Marshall, 2016). The primary purpose of field notes is not only to capture ideas or observations in the moment, but more importantly for use as a reflective tool.

As a matter of practice I took notes during meetings, interviews, workshops, etc. Because many of the conversations I had were held in Spanish, whenever possible I used a hand-held digital recorder to capture many of the discussions. Although I am bilingual, Nicaraguan Spanish is sufficiently different from Puerto Rican Spanish so recording was a way of capturing notes that allowed for more precise translation and understanding at a later time. Recording was only conducted with consent.

5.2.2 Interviews

The use of interviewing is another method often used in research. The purpose of interviewing is to gather data from individuals or groups to answer the research questions (Marshall, 2016). Interviewing as an activity contrasts with observational methods (studying what people 'do') or document review (data gathered from what is already written) (Marshall, 2016). Some of the benefits of interviewing are the opportunity to clarify questions and deepen learning about the information being offered, which serves as a way of increasing legitimacy (Marshall, 2016).

A challenge of conducting interviews was that my position as a 'researcher' created an unequal power dynamic with the people being interviewed. The interviews were held in English and/or Spanish with some interviews being able to be scheduled in advance while others were more spontaneous (i.e. while out in the remote regions).

Before continuing, I want to briefly discuss the seven telephone interviews I did as part of scoping the research project at an early stage in 2013. Initially, I stated in my formal assessment document²⁶ that I anticipated using Ulrich's (1983) and Stephens's (2013a) theories to conduct a "research project that will analyse the role that organisation development plays in Agricultural Network, an international aid programme, seeking to intervene using a systems approach for improvement" (Lewis, 2014a:1). After reading the funding proposal and conducting the interviews, I became aware that the new Agricultural Network grant was shifting from a focus on individual rural farmers (e.g. micro-level). The emphasis now was to work primarily with dairy cooperatives (small and medium sized enterprises or SMEs). These SMEs would have more capacity to implement the 'expert' recommendations provided and hopefully strengthen

²⁶ A 10,000 word formal assessment document is a requirement of the University of Hull academic process, and it is written and examined after nine months of PhD study. The outcome of its examination determines whether the student will progress with the PhD or not. My document provided an overall summary of the research, a literature review, questions to be addressed, a calendar of progress to date and a plan for the rest of the research.

the dairy and livestock value-chain. It seemed appropriate for me to shift away from organisational development as a primary focus, and from critical systems heuristics as a central methodological approach. The shift I posited was towards a systemic intervention focused on gender equality as the primary research aim and a more pluralistic use of methodologies. This seemed particularly appropriate with the advent of the new grant, which was still being shaped at the country level. One interviewee from the scoping activity encapsulated the need for a gender equality focus. When asked, “How are women’s unique voices to be included in the future design of the Agricultural Network programme?” The response was, “When working with groups at grassroots level, you see women participating, but at the higher levels in the country programmes, very few women are involved. I was never asked to specifically build women’s capacity within any of my projects” (Lewis, 2014c).

This interview exercise was helpful in other unexpected ways. By using a pluralistic interview protocol²⁷ I was able to test, and deepen my knowledge of, how to consolidate three systemic approaches - Critical Systems Heuristics (Ulrich, 1987), Systemic Intervention (Midgley, 1997c) and Feminist Systems Thinking (Stephens, 2013a) - into a practical tool (Appendix A) that informed the evolution of the Feminist Systemic Intervention model for the upcoming workshops in Nicaragua.

5.2.3 Documents Review

Another primary source of data were existing documents and webpages. The use of documentary research as a primary data source was essential in this project, as for many of the stakeholder groups I was working with were funded through U.S.A. government tenders, which invite bids from eligible organisations for large projects in development contexts. To receive such funding, organisations must submit detailed plans and budgets of how they

²⁷ The interview protocol was designed adapting Ulrich’s (1987) social theory planning work, Midgley’s (1997a) work on coercion and Stephens’ (2013a)

will achieve the work and what outcomes they anticipate. A benefit of using government documents as a source of data is that they are mostly public documents that reveal information that may not be immediately apparent through other data sources such as interviewing (Marshall, 2016). Web pages were also analysed, as most government funded agencies are required to maintain a current website with information about their activities.

5.2.4 Observations

Observations are used extensively in research fields such as sociology, anthropology, and psychology to better understand behaviour patterns, norms and beliefs at the individual, group or societal level (Marshall, 2016). The benefits of observations are many; being able to directly witness events or activities first-hand, for example, which is not an experience afforded when reviewing documents. In fieldwork situations, the ability to conduct observations could allow for witnessing activities, behaviours and relationships as they normally may occur in their natural setting (Marshall, 2016). Some drawbacks to using observations as a data source include observer biases, perceptions, and memory (Marshall, 2016).

5.2.5 Facilitation

One of my key activities and skills as an organisation development consultant was that of facilitation. The goal of facilitation, whether of individuals or groups, is to increase effectiveness; supporting them to identify issues, solutions and actions based on their own wisdom (Bens, 2012). The role of facilitator is one of leadership; building collaboration and providing structure, critical reflection and guidance on the benefits or drawbacks of any particular decision that is being made. Ideally, a facilitator focuses on the process of decision-making and paraphrasing information back to participants when possible, to ensure the involved people are in agreement with what is being deliberated (Bens, 2012).

My facilitation role was extensive. Identifying gender equality priorities and understandings with the different hierarchical levels of an organisation in different countries, working with their partnerships in Nicaragua and conducting systems thinking workshops all were activities that occurred.

5.2.6 Capacity–Development Workshops

Workshops in development contexts have a mixed reputation. According to Chambers (2005:41) who is an expert in the field of participatory workshops in development contexts, “Workshops have proliferated, at times to epidemic levels, in and near capital cities. They are convened in the name of consultation, participation, partnerships, experience-sharing, establishing networks, capacity-building, and discussion of policy”. From the 1980s-1990s capacity-building, which includes workshops, was a term that was a synonym for training as a way of “enhancing and the competence and problem-solving capabilities of people and institutions” (Chambers, 2005:48). Since the 1990s, and still relatively true today, the term ‘capacity-development’ is used to suggest a more sustainable approach to global development with the intentions of “adaptation, evolution, growth, good change and facilitation” (Chambers, 2005:48).

Capacity-development workshops were a key method within this research, for they were a way of receiving input and feedback to the principles of Feminist Systems Thinking. My process was to create an initial workshop introducing the five FST principles (e.g. being gender sensitive, gender equality, valuing voices from the margins, centring nature, selecting appropriate methodologies and methods and bringing about social change). During the initial workshop and every subsequent one language and concepts were culturally adapted or dropped altogether as a means to create a new method that represents the knowledge and wisdom from the stakeholder groups. Many of the workshop participants were new to facilitation and workshop theory and design, so time was allotted for introducing those interested to to

basic learning theory (e.g. selecting training methods based on individual learning styles, how to design effective learning materials).

5.3 Objectivity

One important characteristic debated in most research is the idea of objectivity (Creswell, 2014; 2015; Marshall, 2016). Objectivity refers to the ability to withhold bias, and to remain impartial or neutral throughout the research project (Creswell, 2014; Denscombe, 2014). Maturana (1988a) makes a distinction between 'objectivity in parenthesis' which declares that this type of independence is impossible and 'objectivity without parenthesis' which suggests that independent observation is possible for "all knowledge is known from a particular standpoint by human beings" (Midgley, 2000:54). Within systemic intervention a practitioner acknowledges the unachievable ideal of objectivity and alternatively seeks "believability, based on coherence, insight and instrumental utility" while engaged with the action (Creswell, 2014:206).

5.4 Systemic Intervention Practitioner

Within any intervention, a crucial influencing factor is the agent facilitating the change process (Midgley, 1992c; Romm, 1996b; Gregory, 2000). Acknowledging this influential role, I recall and support the essence behind a quotation attributed to a founding theorist of critical systems thinking, C. West Churchman: "A systems approach begins when first you see the world through the eyes of another" (1968:231).

As a veteran consultant, I anticipated having my interpersonal and intrapersonal skills regularly tested and enriched. It was my responsibility to create and facilitate a safe container for stakeholders to do their work and to remain vigilant for potential marginalisation of ideas or people (also see Midgley et al, 1998). When I work with cultures new to me, I have noticed that I question my moral reasoning and social dynamic skills. This required continuous reflection, vigilance and acknowledgement of my limitations:

“...you can never be fully informed, since there is an infinite range of potential errors...” (Trompenaars & Hampden-Turner, 1997:201).

Along with increasing my social and professional competencies during interventions, another area of focus was the real or perceived power imbalances caused by my privileged roles (some self-identified; some ascribed by others) as ‘PhD researcher’ and an ‘American organisation development expert’ (Brisolara, 2014). Being new to Nicaraguan culture, I relied on a unique set of cultural and personal ‘instruments’ to learn, adapt and integrate my diverse actor roles.

I was born and raised bilingually and bi-culturally (Spanish and English) on the Caribbean island of Puerto Rico. I am fair-haired and light-skinned, born to non-Hispanic parents; nevertheless, I have always considered myself as having a Puerto Rican nationality. Until the age of eleven, I wandered serenely between the Hispanic and the American cultures and norms. At home, our family followed U.S. predilections (e.g. both of my parents worked and we spoke English). Everywhere else in my daily life, I felt ethnically Puerto Rican. Life was familiar and content. It was a great childhood. Then we moved to a new country.

Arriving in the United States at the age of 11, from the only home I knew, I was unprepared for the seismic shift I would undergo to make sense of my new ‘home’. Some of the adaptations were subtle; coconut juice could be bought in cans and Bugs Bunny²⁸ was bilingual. Some of the changes were much more strident: black/white racism and desegregation of schools where students, teachers and families were ill-equipped to respond to changing cultural norms. There was palpable tension before, during and after school, day in and day out.

Since leaving Puerto Rico, I have always felt like a culturally nomad, emotionally intrigued but not connected with any country in which I travel or

²⁸ Bugs Bunny is a Warner Brothers anthropomorphic rabbit cartoon character popular with children in the 1960s. I had only heard Bugs speak Spanish prior to moving to the U.S.

live, including my passport country, the United States. I later learned that what I was experiencing is commonly referred to as being a ‘Third Culture Kid’ (Pollock, 1987). Third Culture Kids are people who have spent a significant period of their developmental years in a culture other than their parents’ home culture (Culture #1), thus integrating values, understandings and social cues of the host culture (Culture #2). Thus the Third Culture Kid bridges both cultures into a new culture (Culture #3), unique to the individual as a way to create meaning for themselves. Because Culture #3 is not the same as either 1 or 2, and only 1 and 2 are shared with others, the Third Culture Kid never feels a full member of any culture (Pollock & Van Reken, 2009)²⁹. Generalising some of the Third Culture Kid idiosyncrasies helped me understand my own agency. Further, it has eased integrating and adapting to most cultures as something natural and comfortable.

5.5 Pluralism of Roles: Researcher and Volunteer

My role as an intervention practitioner also embodied a pluralist component. Along with my bicultural upbringing, another source of influence was my dual and embedded role as a doctoral researcher and organisation development volunteer (See Figure 5.1 below). This embeddedness made my role layered and complex, requiring an amplified reflexivity in order to continually evaluate and learn about the cultural, political, and ideological contextualisation of my



Figure 5-1 - Systemic Intervention Roles

something different about these kids. They function at a whole different level. They think differently. They have a different base, and a different point of reference” (Pollock, 1987:1)

research (Hertz, 1997).

Reflexivity is pertinent as a practice in both my systemic intervention and the work I do in global development. Being reflexive, critical, reflective, demands a constant vigilance by a me as a practitioner about my own behaviour and decisions and their potential impact on projects. My own values, biases, priorities, needs are present both in my internal dialogue as well and by my attitude and behaviour. Being reflexive also acknowledges that as practitioners or researchers we are part of the system we are engaging with, not outside its boundaries or mere observers. I believe that reflexivity in social research (Sultana, 2007; Brisolara et al., 2014), and boundary critique in CST (Yolles, 2001; Cordoba & Midgley, 2008), are cut from the same canvas. This canvas is stretched and shaped by participatory ideals giving paramount importance to critical reflection on the researcher's own biases, perspectives and assumptions. This is in tandem with critical reflection by the stakeholders and/ or research participants with whom the researcher partners. A way to view reflexivity is the

“...analysis of how the production of ethnographic knowledge is shaped by the shifting, contextual, and relational contours of the researcher's *social identity* and her social situatedness of *positionality* (in terms of gender, race, class, sexuality and other axes of social differences) with respect to her subjects” (Brisolara, 2014:33-34, emphasis original).

5.6 Practitioner Bias and Ethics

A prominent bias for me as a feminist researcher with an unflinching commitment to gender and social equality is that I saw a lot through this lens. I often found myself judging potential cultural biases that remained unobserved or devalued by individuals or organisations that, if not discussed, could lead to further marginalisation. Consequently, the idea of being an observer who was “unobtrusive or non-reactive” (Angrosino, 2005:732), “passive” (Spradley,

1980:58) or a “peripheral member” (Adler & Adler, 1987:39), was never going to be appropriate for me. From a systems point of view, the roles of an interventionist and observer are equally essential for effective critical analysis and therefore cannot be uncoupled (Midgley, 2000). The reasoning is clear: as a “sentient being” I am, in fact, part of a “knowledge generating system” therefore, my mere presence and interaction engenders and contributes knowledge to any systems with which I interact (Midgley, 2000:114).

From an ethical viewpoint, some of the practices I used are seen as standard guidelines within research, such as identifying myself, my University affiliation, my purpose for meeting with groups and gaining informed consent (verbal and written). Nevertheless, I made sure that people knew the study was using an emergent framework. Further, I invited people to join me in adapting the framework for their own needs and communities. I reassured everyone that participation was voluntary, that consent could be withdrawn at any time and that questions were welcome before, during and after their participation.

5.7 Boundary Judgements and Context

As discussed in Section 3.9, the process of boundary judgements is a primary activity in a systemic intervention. Midgley’s (2000:79) process philosophy within a systemic intervention asks practitioners to conduct both a “first order” (looking outward) and “second order” (looking back) boundary assessment to identify the problem context with which to work. For this research, the first and second order judgements were done in multiple iterations, some anticipated, some that emerged.

For example, Global Development (introduced in Chapter Six), is the primary international non-governmental organisation which has oversight over the Agricultural Network programme (see Chapter Six) in which this research was conducted. Global has control and decision-making powers to allocate funding to its programmes in Latin America and the Caribbean, which suggests a good starting point for a first order boundary judgment in partnership with

its U.S.A.-based staff. However, working with the country office in Central America, it was important to conduct another first order review to help identify existing or new partnerships that might be appropriate to be involved in the intervention. Simultaneously, the country office and I conducted a second order judgement and looked back at Global Development to confirm, expand or reframe the boundaries previously determined. As Midgley (2000:80-81) claims, “It is possible to make a variety of boundary judgements when looking ‘outward’ towards the world, and a variety of judgements when looking ‘back’ at the knowledge generating systems which produce these ‘outward’ judgements.

A key benefit of being systemic is the increased clarity of the context you are working in and the identification and inclusion of participants at the various levels on an organization or programme. The value of adopting participatory practices that support a diversity of ideas and voices, whether they are part of the actual intervention or potentially impacted by it, is underpinned by research suggesting the poorest and most marginalized groups were “more concerned with *how* development was delivered, than *what* was delivered” (Leavy & Howard, 2013:3). Equally, however, the process of auditing an intervention to ‘sweep-in’ data and diverse voices that may have been previously excluded (with or without intention) increases the complexity of the project. A significant current discussion within the evaluation field (and others) is the understanding of systems thinking, particularly studying complexity and emergence (Guijt et al., 2010; Patton, 2011; Hargreaves & Podems, 2012; Reynolds et al., 2012; Reynolds, 2014; Bamberger et al., 2015).

5.8 Legitimacy

Along with boundary judgements and contexts, the concept of legitimacy of a systemic intervention is particularly important (Midgley, 1992b). Legitimacy is whether a research approach is appropriate, not whether the propositional knowledge discussed by participants is accepted as true (Tracy, 2013). The issue

of truth is a validity concern, and is of subsidiary interest, in two senses. First, validity becomes important if a proposed intervention has within its legitimate remit the deployment of scientific methods (or other methods that seek to establish robust propositional knowledge). Second, validity is important in relation to an evaluation of a systemic intervention, which is designed to produce methodological knowledge that can be used beyond the immediate context (Midgley et al., 2013). In terms of establishing legitimacy, the process of boundary critique (as an iterative process within a systemic intervention) requires thoughtful reflection on whether the proposed intervention dovetails with the goals of the participants and on whether it addresses power relations adequately when participant goals are at odds (Midgley et al, 1998). There were times, described at length in later chapters, where I chose to make changes in vocabulary, timing and cultural framing based on my observations and, more importantly, after receiving implicit and explicit feedback from stakeholder groups.

5.9 Transferability

The typical length of most PhD programmes in the United Kingdom is three years. This timeframe does not afford the luxury of building a method that can be confirmed through empirical research to be fully transferable across contexts. Checkland (2000) notes the need for decades of research with multiple case studies to allow for conclusions about transferability. My aim, therefore, was more modest: to produce a new model with the *potential* for transferability.

My ability to transfer across contexts was also limited within my PhD fieldwork by the use of participatory practices, which require partnerships to be created. Partnerships, which are based on relationships, are indispensable at the local level to build understanding that can influence policies, but they are time-consuming to construct and are intrinsically situational (Pawson, 2006). Consequently, with only three months 'on the ground', doing more than one intervention was not possible. (Although, as I will show later, I ended up

running very different projects in the Washington Headquarters of my partner organisation and in its offices on the ground in Nicaragua). What I was able to accomplish was to 'test' my method in the form of a contextual intervention. Then I was able to evaluate it as a single exemplar of knowledge that can be 'transferred' and adapted or reused by others. Others who consider using my method will then need to reflect on the method's relevance for their particular contexts (Tracy, 2013).

5.10 Chapter Conclusion

This chapter begins a transition from the theoretical portion of my research to the practical fieldwork. In Chapters One-Three I built the foundation of how systems thinking has changed and adapted from a positivistic analysis to a critical one to be more inclusive and responsive to perspectives and contexts. The contextual plurality involved in a problem situation indicates a need for being more responsive and flexible in the use of methodologies and methods. Chapter Four went on to introduce the struggle for gender equality both in the global North and South and the subsequent changes that evolved due to feminist critique and global feedback from a range of theoretical fields and the impact those discourses held on gender and global development.

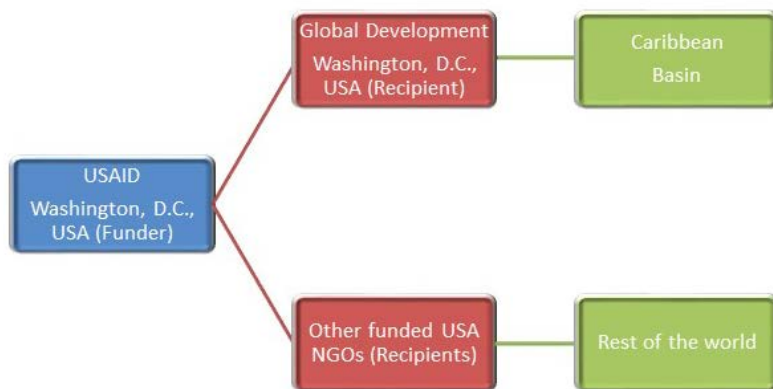
The practical part of my research, my fieldwork, is described in detail in the three phases: Chapters Six (phase one), Chapter Seven (phase two) and Chapter Eight (phase three) unfolding my systemic intervention methodology using pluralistic strategies and methods changing and adapting based on the context. The contexts were diverse, not only geographically, but also in terms of the stakeholders involved, the needs that emerged and the work being done. Things changed, sometimes on a daily basis. A key element of validity and rigour is that the research engages with the right people and that often meant adapting the methodology to fit the people with whom I was working (Midgley, 2000). In each of Chapters Six, Seven and Eight, I summarize key

methodological learnings which then contribute to Chapter Nine, my conclusion chapter.

Chapter 6 Phase One: Systemic Intervention in Washington, D.C. February – March 2014

Before I introduce Phase One of my fieldwork, there are five organisations or programmes I renamed to protect their identity. Since it was not essential to the study protocol, information identifying research participants was not collected. Additionally, since this is an intervention involving my own critical reflection on what was achievable, and not all these reflections show the partner organisation in a positive light. I chose to provide anonymity for individual research participants, programmes and organisations by using pseudonyms. That being said, I have chosen not to leave anonymous the primary U.S. governmental funder of development projects, the United States Agency for International Development (USAID). The primary reason for this decision is that I believe this organisation, and others like it, while doing extensive and important work for global gender equality (and other global development efforts), benefit from critical feedback by people who work for them in the field. The goal is not to rebuke them, but to support their efforts to create an equitable world that works for everyone. The critiques of this USAID programme are not unique to Global or their efforts. As mentioned previously in this thesis, gender equality has not been achieved by any country. Global and the Agricultural Network programme are part of a global, systemic failure to afford equality, a basic human right, for all women and girls.

The first pseudonym is Global Development (Global), a U.S. non-governmental agency (NGO) funded by USAID to manage and deliver programmes throughout Latin America and the Caribbean Basin. The second pseudonym is for one of Global's larger programmes, which I call Agricultural Network, which is administered in four different countries (See Figure 6.1 below). I ultimately worked with the country office in Nicaragua which I have used a third pseudonym called Nicaraguan Agricultural Network. The fourth pseudonym is for the monitoring and evaluation experts, now being called



(Lewis, 2015)

Figure 6-1 - USAID's Agricultural Network Programme

University of the North Extension (North Extension), who have worked at length to include gender equality within Agricultural Network programmes during the previous funding cycle and the current one with limited results.

Phase one of my intervention began in Washington, D.C., U.S.A. I introduced my project to the Senior Director of the Agricultural Network within Global in Washington, D.C. by way of a summary document explaining the intended research and systemic intervention. Together the director and I did an initial first order boundary critique identifying which of the four countries they worked with would be interested in participating in the research while also have the capacity to host me. Initially, the country selected was Guatemala (see 6.2) for it was brand new office and would benefit from having an organisation development volunteer to help them in the start-up phase and it would be more systemic to create and integrate gender equality into their developing practices and policies. Ultimately, the country office I worked with was in Nicaragua which was an established office with staff interested in gender equality. The other two country offices in Haiti and Dominican Republic were going through leadership and staff turnovers, and would not be able to host a research project.

I had an established relationship with Global having conducted four previous consulting projects with them in the Caribbean and Central and South America. The focus of the project (described in more detail below) was to strengthen their gender equality practices and policies using Feminist Systems Thinking and provide capacity development for their staff and partners. Because other stakeholders were still to be identified once I arrived in country, further boundary analysis could not be made in advance. Ultimately, the majority of the participants in my research were also part of Nicaraguan University's research project (described in Chapter Seven).

Throughout the intervention, observations, interviews, dialogues, meetings and workshops occurred in which the concept of systems thinking was introduced, discussed, culturally adapted and applied with different business sectors and broad stakeholder groups. Other data gathering methods, such as structured surveys, were rejected because of my uncertainty of the literacy level of participants and my desire to avoid causing discomfort. Other methods such as experiments were not possible because of the remote locations and my limited access to them. I chose methodologies and methods that supported my ability to perceive and interpret knowledge from observations, and that allowed me to personally engage with individuals and groups in their cultural contexts. Central to shaping my research, and to the creation of a new intervention method, were the relationships I built with staff of the NGO and University systems. Using capacity development and participatory practices, my aim was to create and to test a new method which would further improve and adapt Stephens' (Stephens, 2013a) Feminist Systems Thinking theoretical framework into a culturally-relevant analysis model. Additionally, my hope is that it has the potential to be transferred to other contexts by individuals and organisations.

6.1 Chapter Structure

For ease of understanding and reading, I have broken the fieldwork into three Chapters Six, Seven and Eight representing three distinct intervention phases. Chapter Six is divided into seven sections. It provides the context and foundational information about Global, its large volunteer-driven programme implemented in the Caribbean Basin called Agricultural Network. My research was founded with Nicaraguan Agricultural Network, the specific country programme where I conducted my research. Section 6.1 describes the structure of the fieldwork chapters. Section 6.2 briefly reviews my original research project, which was to have occurred in Guatemala. Ultimately, I moved the fieldwork to Nicaragua due to administrative challenges within Global. Section 6.3, I discuss the conversations and processes I facilitated with Global to narrow the scope of volunteer work for me while in Nicaragua. This resulted in a volunteer agreement with flexibility and some specific deliverables³⁰. Section 6.4 describes USAID's gender priorities within the grant tender it released to fund the global Agricultural Network Programme. Section 6.5 explains the funding proposal written in response to USAID's tender and how gender was addressed. Section 6.6 captures some methodological learning from phase one of the fieldwork. Section 6.7 is the conclusion for Chapter Six.

6.2 Proposed Fieldwork Location: Guatemala, Central America

The advent of my doctoral fieldwork coincided with Global receiving another five-year grant (2013-2018) from USAID to operate Agricultural Network country offices with local staff in four countries: Dominican Republic, Guatemala, Haiti and Nicaragua. Global is an American company established in 1964, describing itself as a “non-profit, non-partisan, non-sectarian

³⁰ 'Deliverable' is a project management term often used in organisation development interventions. A deliverable can be a tangible or intangible product that one agrees to provide as evidence of an outcome to a client.

organisation” whose mission is to “connect people and organisations across borders to serve and to change lives through lasting partnerships. These partnerships create opportunity, foster understanding, and solve real-life problems” (Global Development (Pseudonym), 2012:1).

The structure of Global is based on creating and sustaining over time (sometimes decades) global North/South networks of volunteers and development staff, including universities, development agencies and civic organisations. These work on a broad range of development themes, such as youth and children, higher education, climate change, civil society and governance, women and gender equality, to name but a few (Global Development (Pseudonym), 2015c). Its core principles include a commitment to both social and economic values, global in breadth, providing volunteer service and engaging in collaboration and individual empowerment (Global Development (Pseudonym), 2015b).

According to their 2012 annual report, their net assets at the end of that year were close to U.S. \$16 million, with about 86% of revenues received through U.S. government contracts (Global Development (Pseudonym), 2012). Global’s current Agriculture Network³¹ programme, in which I would conduct my research, represents around U.S. \$8 million of those government revenues, or half of their annual budget.

My initial fieldwork project with Global was first scheduled in Guatemala where they were opening a new office in January 2014. Based on my previous work with Global, they valued my skills as a consultant. My research on gender and systems was seen as extremely relevant and useful as they launched their first Guatemalan country office and hired a new team of country staff. Due to months of administrative setbacks (e.g. a delay in hiring the Country Director

³¹ “The Agricultural Network programme, funded through the U.S.A. 2008 Farm Bill, was first authorized by the U. S. Congress in 1985 to provide for the transfer of knowledge and expertise of U. S. agricultural producers and businesses on a voluntary basis to middle-income countries and emerging democracies” (Global Development (Pseudonym), 2015a)

and changes in key programme staff at Global's Washington office), together with the constraints of my PhD research timetable, we decided to forgo waiting for the Guatemala office to open. Instead, I was to go to the Nicaraguan Agricultural Network, which already had an established office and staff in place. These people were tasked with developing a new five-year (2013-2018) country strategy with new funding; they welcomed extra support.

Based on my previous organisation development pro-bono contracts with Global, I had a strong relationship of trustworthiness and mutual respect with the organisation and their Senior Director of Agriculture and Food Security, who was accountable for the Agricultural Network programme in the Caribbean Basin. This relationship was a pivotal one which facilitated access to conducting my research initially in Guatemala and then as it transitioned to Nicaragua. Moving my research to a new country was not an inconsequential decision. On the one hand, the change of location was beneficial, for I would be working alongside a veteran Agricultural Network team in Nicaragua, making it easier to learn how the previous country strategy (2008-2013) differed from their new five-year mandate. Also, I would have a clearer understanding of barriers that exist in implementing a new five-year grant. A secondary benefit, based on logistics and start up time, was working with an established country office. This eliminated the need to address time-consuming programme infrastructure needs, such as finding office space, buying vehicles, hiring and training staff. Furthermore, the Nicaraguan Agricultural Network office had an extensive network of partnerships throughout the country that could help in the identification of stakeholders for research purposes.

However, there were also drawbacks to changing locations. With Guatemala, a new country programme, I would have had a hand in the integral design and implementation of their new initiative. I would have had the opportunity to shape a systemic intervention that would have perhaps left an integrated imprint on how gender equality was mainstreamed into the programme. There

would also have been an opportunity to work with staff new to Agricultural Network, allowing for fresh input to mainstreaming gender equality. Unfortunately, this opportunity was lost.

Ultimately, I was reassured to be moving forward. Additionally, the Nicaragua staff was grateful for receiving extra support while it began the recruiting, interviewing and screening process to identify new country 'hosts'. My research questions and sub-questions and initial methods (e.g. boundary critique, document review, observation and workshops) remained the same. What did change significantly were the individual, group and organisational stakeholders, along with the specific accountabilities of my volunteer organisation development consultant assignment, explained in the next section.

6.3 Washington, D.C.: February – March 2014

My primary role in a systemic intervention is to facilitate the identification of the problem context and stakeholders to be involved (boundary critique) and co-create ideas about how to facilitate the change this is desired by the people and groups with whom I worked. In many systemic interventions areas for improvement as defined by the stakeholders are identified. Many of these improvements are also actionable meaning if there is an interest and will by those identifying the changes, a plan of action can be designed. To encourage change that has a greater opportunity of sustainability, my approach is to use inquiry, facilitation and dialogue. I have found that participatory processes support stakeholders to identify the areas for potential improvement based on their experiences and needs, and then assist them to identify potential change routed in their local contexts.

To that end, partnership and participatory practices are the cornerstones my work. Acknowledging and leveraging the basic and intrinsic wisdom and expertise already present in individuals, organisations and communities builds on local knowledge systems to identify and solve problems. My role is to collaboratively work with these local experts as they co-create viable and

sustainable action plans that address organisational and community needs. In working particularly with disenfranchised populations, I recognise the primacy for people to be able to participate in and adopt a process that results in a plan tailored to meet their unique needs, priorities and cultures. In this respect, I do not operate with a naive understanding of 'full participation', as it is important to take power relations into account as there are frequently other relational dimensions in play.

Using this covenant as my professional conviction and commitment, I began to clarify for myself and others within Global and Agricultural Network, the multiple and overlapping roles I would be performing throughout my fieldwork. Regardless of the day, location or stakeholder group, I clarified and discussed my roles. At times, I might primarily be functioning as an organisation development consultant conducting organisational assessments, collaboratively identifying areas for technical support. Other days I would be leading Feminist Systems Thinking workshops introducing systems thinking tools as a researcher. There also were days where I would wear both 'hats', looking for systemic opportunities to reflect on gender equitable programme planning.

As an experienced volunteer with some accrued assumptions and biases on the significance of gender equality in the programme, I was open to learning more about the existing organisational understanding beyond the programme in which I had participated. I was interested in how much of a priority it was. What I had noticed in my four previous projects with Global from 2009-2014 in the Caribbean Basin was that the further you moved from the theoretical design phase of a project, typically designed at the NGO level in Washington, and stepped closer to the grass roots level of project implementation, the more vaporous gender strategies seem to become. A 2012 USAID policy, the funding agency for the Agricultural Network programme, is unequivocal about why gender equality matters:

“...policy on Gender Equality and Female Empowerment is designed to enhance women’s empowerment and reduce gender gaps, the policy affirms the critical role women play in accelerating progress in development and advancing global prosperity and security. As [U.S.] Secretary [of State] Clinton has said, ‘Gender equality is both the right thing to do and the smart thing to do.’” (U. S. Agency for International Development, 2012b:iv).

From my vantage point, some of the inconsistencies in project outcomes in many of the projects I worked on came from a lack of mutual understanding between five interrelated stakeholder groups: USAID (the funder of Agricultural Network worldwide); Global (the sub-contractor for the Caribbean Basin); the ‘in-country’ Agricultural Network staff (Caribbean Basin); NGO partnerships within each country; and finally, the ‘hosts’ or primary stakeholders of technical assistance in rural communities. I based this assessment from my work with Global in their Agricultural Network programme in five different Latin American countries over five years (Lewis & Sherlock, 2009a; Lewis & Anderson, 2013; Lewis & Sherlock, 2013).

Previously, my work with Global entailed short-term interventions, such as facilitating the creation of business plans, team and leadership development, decision-making, conflict resolution, organisational assessments and strategic planning with a range of stakeholders (e.g. a technical education college, women’s cooperatives and rural enterprises). Each assignment had its distinct missions and contexts, but they also shared an unfailing constraint: the average length of the visit was 14 days. Ten of these days were actual ‘work days’. Some were spent travelling time-consuming distances between communities, leaving precious little time to interact with staff and participants. Other persistent challenges included assignments that were too broad in scope for a two-week intervention. There was dissonance between identified intervention needs, as described by the Washington office, and the actual challenges and priorities

rural participants/farmers were facing. Additionally, there were unidentified or unknown group dynamics or power differentials within stakeholder groups. There was evaporation of gender policy when translated into actual programmes or participation. Not least were marginalisation of certain stakeholders and project timing frames conflicts (Lewis & Sherlock, 2009b; Lewis & Anderson, 2013; Lewis & Sherlock, 2013). Building on these experiences, I approached Global with my research as a way to strengthen their newly funded and substantial five-year U.S. federal grant launching in 2013.

6.4 USAID's Agricultural Network and Gender

Having written federal grants for 12 years in my previous job, I knew a logical starting point to learn the particulars of the Agricultural Network programme was in two specific documents. One is publicly available; one is not. The first document is USAID's 'request for applications' released online as an official grant opportunity offered by the U.S. Government. It seeks eligible³² applicants to respond with their own grant proposal and budget, explaining how they will meet the requirements to provide the programme described within the request for applications. The second document, a proprietary one, is Global's successful Agricultural Network grant proposal written in 2012-13 in response to the first document I referred to, i.e. USAID's request for applications.

Beginning with the request for applications, the 83-page instruction document details funding eligibility, budgets, priorities, monitoring and evaluation³³ expectations. It also details application submission procedures asking applicants to respond with a project proposal to "to provide for the

³² "Eligible applicants must be either: a U.S. Private Voluntary Organisation registered with USAID; a U.S. non-profit farm organisation; a U.S. agricultural cooperative; a private U.S. agribusiness or agriculturally-related business or consulting firm; or a U. S. college, university or foundation maintained by a college or university" (U. S. Agency for International Development, 2013)

³³ Monitoring and evaluation is a common acronym representing practices within a development context which seeks to monitor progress as a means to facilitate evaluation, which can lead to changes in data collection and programme plans (United Nations Development Programme, 2009)

transfer of knowledge and expertise of U. S. agricultural producers and businesses on a voluntary basis to middle income countries and emerging democracies” (U. S. Agency for International Development, 2013:10). As background, in the United States, federal grants are issued by the government as a means to finance states, territories, tribes, educational and community organisations to carry out a public purpose either domestically or internationally in a range of sectors such as the arts, agriculture, community development, education, energy, health, etc. (U. S. Government, 2015).

USAID’s importance as a political arm of the U.S.’s political hierarchy can be surmised by its location on the government’s organisational chart, which makes it accountable to the U.S. Secretary of State. The Secretary of State is principally concerned with foreign affairs, leads the Department of State and is a member of the President’s Cabinet. USAID’s mission, “Global to *end extreme poverty* and promote resilient, democratic societies while advancing our security and prosperity”, will receive U.S. \$22.3 billion in fiscal year 2016 to support its efforts (U. S. Agency for International Development, 2015a, emphasis original). Within USAID’s organisational chart, the Office of Gender Equality and Women’s Empowerment³⁴ works to “integrate gender equality and female empowerment systematically across USAID’s work, along with ongoing programmes and projects to advance female empowerment and gender equality” (U. S. Agency for International Development, 2015b).

The emphasis on gender is also explicitly highlighted in the USAID’s Agricultural Network request for applications in the section called “other critical implementation requirements” as an area “requiring special attention” (U. S. Agency for International Development, 2013:33-34):

“Gender: The Recipient shall provide systematic consideration of gender issues and impacts in the Agricultural Network programme and shall seek to promote

³⁴ The Office of Gender Equality is one of 13 USAID offices within the Bureau for Economic Growth, Education and Environment (U. S. Agency for International Development, 2015b)

gender equity. Each country Agricultural Network Project description shall assess gender issues relevant to the sub-sector and measures the project may take to enhance positive gender impacts. Although gender analysis considers impacts on both men and women, in practice, the concern is nearly always ensuring equitable participation and access to benefits by women. Biases against women are pervasive in much of the world, as are differentiated roles between the sexes. Furthermore, it is not uncommon for development programmes to fall short of their goals (e.g. improvements in health and education) specifically because women have not been permitted to participate fully in programme design and implementation. The Recipient shall assess gender impacts and gender equity issues in all Country Agricultural Network Programmes (U. S. Agency for International Development, 2013:33-34, emphasis original).

Further down in the request for applications, some gender indicators are suggested such as “percentage of...assignments by women volunteers; [number of]...women receiving formal training; [and number of] ...women receiving direct on-the-job training” (U. S. Agency for International Development, 2013:46). The final mention of gender appears in the “Full Application Instructions and Evaluation Criteria” where it states:

“Discussion of important gender issues should be provided to demonstrate the applicant’s understanding and commitment to address gender issues and demonstrate planning to ensure balance in access to training and capacity building opportunities in terms of the gender of trainees and other participants, and integration of appropriate gender sensitivity into all activities” (U. S. Agency for International Development, 2013:56).

Although gender is identified as a USAID priority, the language used for accountability is weak, with qualifying terms such as “shall provide systematic *consideration* of gender issues”(U. S. Agency for International Development, 2013:33, emphasis added); “shall *seek* to promote gender equity” (U. S. Agency

for International Development, 2013:33, emphasis added); “shall *assess gender impacts* and gender equity issues”(U. S. Agency for International Development, 2013:33, emphasis added) (with no mention of addressing them). The “concept note clearly describes the potential for substantive and sustainable developmental impacts, *with attention* to gender equity” (U. S. Agency for International Development, 2013:48, emphasis added). “Discussion of important gender issues *should* [rather than *will*] be provided”(U. S. Agency for International Development, 2013:56, emphasis added). It could be said that these qualifying terms are present because of the generally accepted difficulty within development programmes of including gender equality (Kloosterman et al., 2012). As noted in Chapter Three, policy evaporation makes equality priorities easier to describe in the abstract than they are to implement programmatically (Derbyshire, 2012). The acknowledgement of the complexity of gender equality implementation can be inferred when reviewing the ‘resources’ section in the Agricultural Network request for applications. Within this there is an electronic link provided to a free 792-page sourcebook called ‘*Gender in Agriculture*’, which is an extensive resource divided into 16 different gender modules providing topical introductions, technical ideas and lessons learned, followed by case studies in different parts of the world (World Bank, 2008). The sourcebook is intended to “support operational staff who design and implement lending projects and technical officers who design thematic programmes and technical assistance packages” (World Bank, 2008:8). The range of topics is extensive, including gender in food security, rural finance, land policy, livestock, forestry, aquaculture and others (World Bank, 2008:v-vii).

6.5 Global’s Agricultural Network Programme

Late in 2013, Global was awarded a five-year grant to manage the Agricultural Network programme. For Global, the 2013-2018 award of U.S. \$8 million from USAID was their fifth successful application to run the programme. Other NGOs were likewise recipients for the Agricultural Network

programme in other parts of the world (e.g. Asia, East Africa, Europe and Central Asia, etc.). Over the past 22 years (since 1993), the Global Agricultural Network programme has served approximately 85,000 people in 24 funded countries, and has sponsored over 1,500 volunteers who provide 'technical assistance'³⁵ or expertise.

Eighty-seven percent of Global's Agricultural Network budget funding was allocated to support the overall project in the Caribbean Basin. Staff and volunteer management efforts, using the remaining funds, would support strategic partnerships that would manage different tasks such as monitoring and evaluation services and other expert roles over the course of five years.

The expectations for a gender component as a 'critical requirement' are seemingly clear in USAID's request for applications for their global Agricultural Network programme. Continuing to analyse where to establish boundaries around the project, and also to understand the contractual agreement that Global and USAID had in relation to this new funding, in particular around gender equality, I requested a copy of Global's successful 2013 grant proposal. As an experienced grant writer, I understood the amount of effort it took to research, write and submit a multi-million dollar grant, so understandably the Senior Director preferred to provide me with a hard copy versus an electronic version of the document as a way of protecting their intellectual property and the human resources investment they had made. Using the printed version while at their offices, I spent an afternoon reading and taking extensive notes.³⁶

Within Global's successful grant proposal they described various programme strategies that are intentionally broad in order to be responsive to the very

³⁵ "Technical Assistance means the provision of funds, goods, services, or other foreign assistance, such as loan guarantees or food for work, to developing countries and other USAID recipients, and through such recipients to sub recipients, in direct support of a development objective as opposed to the internal management of the foreign assistance programme" (U. S. Agency for International Development, 2013:73)

³⁶ Although I took copious notes from Global's successful Agricultural Network grant application, I neglected to document the page numbers to use for citation purposes. Page numbers are listed as not available (n/a).

different needs of each of their four core funded countries. The overall funding strategy was focused on “value-chain projects” or “sector projects in commodity chains” that show promise of “being economically viable and have a competitive advance while addressing bottlenecks” (Global Development (Pseudonym), 2013a:n/a). Focus areas include “gender, youth, underrepresented populations, using volunteers in non-traditional assignments, maximizing cross-cultural experiences and forming strategic alliances” (Global Development (Pseudonym), 2013a:n/a). Other relevant gender information in the grant proposal contained phrases such as:

“...intentional, thoughtful emphasis on closing the gender gap in agriculture; utilizing forward thinking; participatory monitoring and evaluation systems; prioritising building local staff and host capacity and to generate impacts that far exceed the life of the programme” (Global Development (Pseudonym), 2013a:n/a).

These activities were all good preliminary signs of the inclusive nature of the project and its potential fit with a systemic intervention, hinting to me an interest in co-creating knowledge on how to strengthen gender equality between the funder and beneficiaries as a key for sustainability beyond the funding cycle.

What I had not anticipated, and I only learned upon reading the Nicaragua specific activities, was there had been a significant shift in the type of targeted ‘hosts’. The shift was from independent rural producers, as in the prior programme, to enterprises of 100+ employees and producers. What this indicated, but it was too late to withdraw from Nicaragua, was that my original intention to facilitate workshops with groups of women and men producers/farmers in remote rural locations might have to be altered. I would be working with medium sized businesses rather than independent smallholders. This was a particular disappointment because rural stakeholders

are often the most marginalised, and I was most interested in partnering with small businesses and them in their contexts to explore if systems thinking could be adapted for their purposes. My initial strategy was to better link the various organisational layers of stakeholders (i.e. Global, Nicaraguan Agricultural Network staff and the 'hosts') with an introductory understanding of Feminist Systems Thinking and its commitment to social change so as to inform their continued work together over the next five years. This shared starting point would then perhaps give them an opportunity to compare and contrast worldviews and facilitate an increased awareness of gender issues. However, a fuller understanding of the obstacles I would face in moving this agenda forward would have to wait until the Nicaraguan Agricultural Network strategy was finalised, meaning I would need to wait until I arrived in Nicaragua before learning the full implications for my fieldwork.

Although there was a consistent presence of gender-explicit language throughout the Global grant proposal, and goals for gender equality were set, *how* to meet these goals was rarely specified. A particular goal of "increasing women's participation" is illustrative of some of the problems. The document said that a "minimum of 40% (of recruited technical experts) would be female volunteers and 58% would be female beneficiaries" and "women are to comprise more than 50% of those receiving formal training and direct on the job training" (Global Development (Pseudonym), 2013a:n/a), yet there was no explanation about what the current status was by country, and no identification of opportunities or challenges the programme might face.

Nevertheless, it was good to see some of the previous volunteer recommendations included, suggesting additional training for staff to support their work in the field: "field staff to receive training in programme planning; inclusive development and empowerment of women and youth and special efforts are made to engage women to prevent and address any potentially

harmful programme impacts related to gender” (Global Development (Pseudonym), 2013a:n/a).

In my conversations with Global, pursuant to reading their grant proposal, their staff said that their process for introducing specificity and measurement indicators on gender and other deliverables would be developed collaboratively between the country Agricultural Network staff, the professional monitoring and evaluation team who would make site visits, and Global HQ in Washington. One explanation of why the monitoring and evaluation indicators were lacking specificity was the interest in creating indicators with local staff in each country as a way of providing capacity development (on the monitoring and evaluation process) while also being mindful and inclusive about the importance of specific country knowledge and experiences to setting directions. In the monitoring and evaluation section of Global’s proposal, there were three focal areas; management information systems, focused evaluation studies and a capacity development programme. The University of the North team had been hired to provide a “key focus on tools, processes and capacity that helps translate locally relevant indicators and outcomes to USAID indices and frameworks” (Global Development (Pseudonym), 2013a:n/a). This collaborative approach would thus include multiple perspectives, permit for cultural nuances to be included in the measurements, provide capacity development of country staff and build relationships between the different interrelated funded agents of the Agricultural Network grant. What this country specific participatory process also suggested, however, was the absence of a unified strategy or prioritizing for gender equality activities across the Agricultural Network country programmes.

Once the Agricultural Network grant was read, and with agreement for my fieldwork/consulting to launch in Nicaragua and then segue to Guatemala, the Washington based Programme Officer and I arranged a phone meeting in early March with the Agricultural Network Country Director, a veterinarian of large

animals by trade, and the Country Programme Officer, both of whom had been with Global during the past grant cycle. The four-way conversation accomplished several useful purposes. I was able to introduce and answer questions/concerns about my background as an Agricultural Network organisation development consultant and my research goals³⁷ and learn, at least cursorily, about the local office's priorities for what type of support they required based on my background, skills and extended visit. During the phone call I was provided with more local context and insight into my work ahead, which included helping implement the USAID tools, orient new hosts and gender equality.

What also became evident was the need to postpone identification of other types of desired capacity development (beyond FST and USAID instruments) as the staff were unable to articulate other needs at the time. Retrospectively, I wonder about the restraint I sensed from the Nicaraguan Agricultural Network staff on how best to use organisation development support, taking into consideration this was an established office. Their hesitancy could have been due to their unfamiliarity with organisation development as a field, a problem I had run into on my previous projects. At the time I reflected that there was a need to build relationships first and then conduct a needs assessment once in country.

6.5.1 Monitoring and Evaluation in Development

Currently, there is an estimated U.S.\$138.5 billion in foreign aid being spent, with only a small percentage being evaluated for impact (Glennie & Sumner, 2014). In its simplest form, evaluation might be defined as the “process and product of making judgements about the value, merit, or work of an ‘evaluand’” (Brisolara et al., 2014:42), or “the pursuit of knowledge about value”(Stake, 2004:n/a). The challenge remains that the need for resources for

³⁷ The Nicaragua Agricultural Network office had already received my research proposal overview electronically.

development outpaces the supply of them, making government and organisations eager to seek solutions to complex problems while using their resources more effectively and efficiently (Bowman & Sweetman, 2014). In global development, the impetus for timelier, accountable, responsive, inclusive, mixed-methods (quantitative and qualitative) monitoring and evaluation is at a crescendo (Andersen, 2014).

The increased scrutiny of development work can, in some ways, be seen to stem from the current economic austerity climate driven by the banking crisis of 2008 (Sweetman, 2012). This factor joins with the tenacious complexity and perpetuation of poverty, social, economic, medical and political marginalisation (Bowman & Sweetman, 2014). There is also a sense of reflexivity within development monitoring and evaluation, as it seeks to respond to the increasing complexity of foreign aid projects and agendas; to input from thousands of NGOs, governments and private stakeholders and funders; and to the “intractable problems of causality and bias” (Glennie & Sumner, 2014:1).

I now realise there are mixed messages about the importance of evaluation within the Agricultural Network programme. If one refers to the official USAID policy (2011b:1) on evaluation, it expresses certain values:

“Evaluation is the systematic collection and analysis of information about the characteristics and outcomes of programmes and projects as a basis for judgments, to improve effectiveness, and/or inform decisions about current and future programming. Evaluation is distinct from assessment, which may be designed to examine country or sector context to inform project design, or an informal review of projects.

Evaluation in USAID has two primary purposes: accountability to stakeholders and learning to improve effectiveness” (U. S. Agency for International Development, 2011b:2).

When you compare this with the Agricultural Network Request for Applications document, however, the priority of evaluation is more subtle:

“Programme Evaluations shall fit needs of the programme. The Recipient *may, at its own initiative,* conduct internal Programme Evaluations at the programme-wide, Country F2F Programme or Project level to improve its programme planning management. Plans for such evaluations shall be included in the Annual Work Plans. Copies of such internal evaluations funded with LWA Cooperative Agreement fund shall be provided to USAID. In addition, USAID may, as deemed necessary, fund external evaluations of the Recipient’s F2F programme” (U. S. Agency for International Development, 2013:43, emphasis added).

As a former grant writer for U.S. federal grants, the lack of a required neutral third party evaluator is striking. That being said, Global did contract with an external evaluator for their five year grant. I highlight monitoring and evaluation in this section for it is supposedly the primary vehicle that USAID uses as a means of holding itself, and its funded programmes (like Agricultural Network), accountable as stewards of public resources. Typically, a percentage of any federal grant budget is allocated as a requirement to hire external, independent evaluators to support the ongoing monitoring and evaluation process and contribute to reporting requirements back to the funder. Global chose to re-contract with the same evaluators they had worked with during the prior funding cycle. This decision allowed for a timelier evaluation design process, which relied heavily on trusting relationships between the evaluators and the programme participants and a familiarity with country contexts.

My next opportunity to explore boundaries arose with a grant launch meeting initiated by the arrival to Washington of the external consultants (funded by the Agricultural Network grant). The University of the North’s monitoring and evaluation team. University of the North’s core mission is to support “an ongoing systematic process that University of the North Extension

professionals follow as they plan, implement and evaluate their educational programmes...the programme development process is captured in our programme development model that includes situational analysis, priority setting, programme action the logic model³⁸ and evaluation” (University of the North Extension (Pseudonym), 2015). Two of the team members were people I would subsequently partner with on the Nicaragua project.

The meeting was attended by Global staff, the University of the North Team and me. This group of people essentially represented the entire U.S.A. based stakeholders for Global’s grant, with each person having a lead position in supporting one or more of the four Agricultural Network countries. The University of the North team described their role as using participatory and capacity development practices to co-create logic models and evaluation plans in partnership with each country office and their staff in order to identify the type of information to be collected. This data was to be used to monitor progress and to provide feedback to the programmes for improvement. An additional focus was to build the capacity of the country staff to conduct monitoring and evaluation activities on their own (i.e. they sought to teach others to create logic models).

All four Caribbean Basin Agricultural Network staff had received training on the USAID monitoring and evaluation tools (described next page) at a Global meeting a few months prior in Morocco. Global and University of the North both felt that there was still a level of uncertainty on how best to implement the tools. They agreed that more support was advisable. The importance of USAID’s baseline and organisation development index tools should be noted for two disparate reasons. The first is that these tools are central artefacts of USAID’s monitoring and evaluation priorities. The second reason relates to my systemic intervention. As the first volunteer in the new funding cycle, Global,

³⁸ A logic framework is an evaluation method often required by grant funders to ‘logically’ connect planning, implementation, and evaluation to investments (financial and human resources) to results.

University of the North and Nicaraguan Agricultural Network were relying on my support in the adaptation and adoption of both the monitoring and evaluation tools. This required that I meet and interview all the new hosts in person throughout the country; 5-10 new hosts in year one were anticipated. This access would give me a better understanding of 'what is being done now'. It would also help me propose possible changes in how programme information could be introduced to the hosts. It would also enable me to learn about people's knowledge and experience with gender equality principles and practices. Likewise, it would be an opportunity to engage the hosts in a discussion about my research and Feminist Systems Thinking. This would allow me to determine if they might be interested in participating in workshops. Since Nicaraguan Agricultural Network would be the first of Global's locations to use the new USAID evaluation tools, there was a sense of urgency for the country staff to understand and begin their implementation. This became a central topic of discussion during our monitoring and evaluation meetings. Part of the increased momentum resulted from a delay³⁹ in the USAID funding being released, causing a late start in all their programmes. Global needed to submit their first quarterly report to USAID despite the delayed funding. Nicaraguan Agricultural Network was depended upon to contribute preliminary data as their office was the most seasoned.

For Global, USAID's monitoring and evaluation tools were designed to gather foundational data for each host, information that would be updated annually to monitor progress in regular reports to USAID. The first tool, the "Host Baseline Data" (baseline) form, which the staff were more familiar with because of its similarity to the prior funding cycle's form, captured data such as annual net sales and income, number of employees broken down by gender,

³⁹ The Agricultural Network funding is part of the U.S. Government's Agriculture Act of 2014 (aka the Farm Bill) passed in January 2014, eight months after it was presented to the U.S. Congress in May 2103. Unfortunately, even though the Agricultural Network funding was delayed, the monitoring and evaluation reporting cycle was not.

number of acres of farming land, etc. (U. S. Agency for International Development, 2014b). The second tool, created for the new funding cycle, was the Organisational Development Index used to identify strengths and weaknesses in five “organisational capacity categories”. The categories were governance (e.g. mission and goals), management (e.g. leadership, standard operating procedures), human resources (e.g. performance management system), financial management (e.g. accounting practices, record-keeping) and sustainability (e.g. market-driven decision-making, external linkages (U. S. Agency for International Development, 2014a). The organisational development index is described as:

“...a simplified tool for evaluating the organisational capacity development of hosts over time. This tool is especially important for tracking the impacts of organisational assignments (as opposed to economic, financial, or environmental assignments)” (U. S. Agency for International Development, 2014a).

Upon reviewing the baseline and organisational development index tools in Washington in preparation for a meeting with University of the North and Global, I became concerned that none of the methods being proposed included a gender analysis or a commitment to gender equality indicators or practices. Questions included in the baseline tool would merely record the number of employees, clients, hosts or members (if a cooperative) disaggregated by gender. There are multiple studies that identify gender gap inequalities for women in agriculture (Dolan & Sorby, 2003; World Bank, 2008; Shortall, 2014; Said-Allsopp & Tallontire) suggesting more explicit indicators beyond biological sex are necessary:

“Most of the available studies explain the gap by gender inequalities in endowments: women’s lack of access to land and agricultural inputs, lack of tenure security, constraints in their ability to invest in land and improved technologies,

less access to markets, credit, and human capital, and women facing more institutional constraints (e.g. discrimination), all of which affect farm/plot management and the marketing of agricultural produce” (Udry et al., 1995; Quisumbing, 1996; Tiruneh et al., 2001; Horrell & Krishnan, 2007; as quoted in de la O Campos et al., 2016).

The organisational development index, which is where gender specific data would be most meaningful because of its organisational strengthening intent, did not mention gender at all. The opportunity was overlooked to include a gender analysis and gather baseline information about the number of women in areas such as: leadership, autonomy in business decisions, access to and ownership of assets, access to and decision-making autonomy on loans/micro-finance, representation in business meetings and workloads (in the private and public spheres) (U. S. Government, 2012).

It was during the monitoring and evaluation⁴⁰ meeting that I also became aware that the new monitoring and evaluation tools provided by USAID had been created in the U.S.A., without any input from country staff or from the University of the North. These instruments had not been field tested for ease of use and comprehension. An additional (and, to me, shocking) shortcoming of the tools, beyond their gender blindness, was that the forms were translated from English to Spanish or French prior to tasking country staff with implementing them. A suggestion by the University of the North and me, discussed in the monitoring and evaluation meeting, was for a preliminary translation to be facilitated by Global or USAID as a way to create a common language across all the countries. This would expedite the adoption of the tools. It would also be a means of relieving some of the current start-up burdens on

⁴⁰ “Monitoring of a programme or intervention involves the collection of routine data that measure progress toward achieving programme objectives. It is used to track changes in programme performance over time. Its purpose is to permit stakeholders to make informed decisions regarding the effectiveness of programmes and the efficient use of resources. Evaluation measures how well the programme activities have met expected objectives and/or the extent to which changes in outcomes can be attributed to the programme or intervention” (Frankel & Gage, 2007).

small country offices that come with new funding (e.g. hiring staff, finding hosts, etc.). This suggestion went unheeded. Global's belief was that the local staff would benefit from translating the documents. This process would increase their familiarity with the forms, would help the staff "adapt them" and make the forms culturally appropriate. Ultimately, the enormity of this task, and the impediment it caused organisational development volunteer work and the research timeline, was significant.

Another area of boundary exploration was during the monitoring and evaluation meeting. This concerned my two different roles and their relationship to University of the North's monitoring and evaluation efforts to identify inputs (e.g. resources, contribution, investments), outputs (e.g. activities, services, events) and outcomes (e.g. results or changes) (Taylor-Powell & Henert, 2008). Since this was everyone's first experience with a long-term volunteer/researcher, there were many unknowns about my contribution to their overall mission. This was particularly true since most activities were still in 'start-up' mode. We agreed to keep in touch over the course of the next few months about the progress on the baseline and organisation development index tools. We also agreed I would overlap my visit with theirs (scheduled for June) in order to share knowledge, experiences, and in order for me to be part of the team creating a country logic model. Playing a central role in the implementation of Global's monitoring and evaluation process in Nicaragua offered me a considerable opportunity to help shape Global's adaptation and invigilation of USAID's new data gathering tools. These would be used to establish a 'baseline' of information about the hosts. Thus, it would be possible to establish and document improvement against this baseline over the next five years.

6.5.2 Global's Volunteer Assignment Agreement

As a reminder, the value of boundary critique as an integral component of a systemic intervention is that it aids the process of sorting through the layers of

complexities of a situation. Additionally, it allows for the identification and inclusion of relevant stakeholders and viewpoints (Midgley, 2000). At the heart of a boundary analysis is the intent to identify (as much as possible) the potential marginalisation of ideas and/or people. In a development context such as Nicaraguan Agricultural Network, this is essential to support responsive and inclusive capacity development and empowerment efforts (Midgley et al., 1998; Hopper, 2012).

As a returning volunteer, I was functioning under multiple assumptions based on my previous assignments with Global's programme. This required reflection on my part as I once again became part of their organisation with additional roles as a researcher. I had previously observed that local and NGO staff were not entirely prepared to mainstream gender equality in their programme processes (e.g. they were not trained in the design, implementation and evaluation phases). With my previous consulting experiences in mind, I knew that conducting boundary critiques during my fieldwork would be an indispensable reflective process. As I strove to better link the multiple programmatic tiers of Agricultural Network (Global headquarters in Washington, D.C.; their country office programme in Nicaragua; and the 5-10 agricultural projects with a range of hosts who would be accountable for technical assistance implementation), this reflective process was invaluable. I was able to recognise similar patterns of policy evaporation in all of the Agricultural Network projects I had worked on in the different countries. At the policy level, the accountability and expectations for gender responsive activities were clearly stated, but once in the field the staff development and understanding of these priorities established thousands of miles away were very faint.

As part of my boundary critique process, I spent over six weeks in Washington, D.C. From a systemic perspective, there was an advantage to learning from the Washington office what their vision for the country strategy

`should be'. I was able to contrast that with what the strategy `ought to be' based on the local country understanding. Interacting with the wider organisational system was essential to better connect different perspectives and understandings that could stimulate change. I was also curious to learn about Global's understanding of, commitment to, or resistance to, gender equality. There was a logic from Global that gender equality efforts needed to be driven at the country level and not prescribed as a top-down approach. What that signified at the country level was that gender equality was not a priority for Global and the expectation for gender responsive programmes were not included in the country strategy explicitly.

Conducting a boundary critique on Global's Agricultural Network programme and its sub-systems was intended to gain perspectives from the micro-level (rural business owners), the mezzo-level (country office) and the macro-level (international NGO) independently. This independent, yet interrelated, analysis would be beneficial in building trust with each group. It would facilitate their opportunity to represent their situated knowledge about their work and their relationship to the Agricultural Network programme. Additionally, I hoped it would perhaps increase their comfort level with participating in the research, not because of any expressed concerns, but because I was their first longer-term volunteer. The typical length for a consulting assignment was two weeks and I was going to be working with them for three months.

Prior to my arrival in Washington, I arranged a series of email communications and phone conversations with the Senior Director of Agriculture and Food Security. We began to formalise my volunteer assignment. I had done two initial semi-structured interviews with Programme Officers six months prior. They were, however, no longer working for Global. An entire new team of officers had recently been hired, initiated by the new funding cycle. The 100% turnover of all the Agricultural Network Programme

Officers was not particularly worrying. When programme funding is reliant on competitive grant application processes (called 'soft dollars' in grant jargon), there is a perennial risk of staff leaving at the end of one grant cycle, before a new grant begins, as they seek financial security and opportunities for career advancement.

As part of my analysis, I researched Global's public presence on the internet and in social media. To help understand the overall context, part of my boundary critique involved reviewing appropriate internal and external evaluation documents, many which can be found online. I had received other documents as a volunteer, such as the Agricultural Network's *Volunteer Orientation Handbook*. My goal in reviewing these documents was to better understand how gender equality efforts were addressed at the time of my entry into the organisation, or more accurately how they were *represented*. I did not assume that what was represented in the documents faithfully mirrored what was happening on the ground.

From a developmental programme perspective, the Agricultural Network model is paradoxically brilliant and problematic. In its volunteer manual, USAID acknowledges that promoting economic development with only short-term voluntary technical assistance is a bit "like trying to build a house with only a hammer" (U. S. Agency for International Development, 2005:2). USAID literature asserts that, in the context of the availability of other resources such as infrastructure and political support, favourable policies and paid consultants with longer contracts, the use of highly qualified volunteers on short-term assignments can be effective (U. S. Agency for International Development, 2005). This might be true for expertise that is purely 'technical', such as dealing with horticultural pests or organic farming concepts, but it is less accurate for organisational development interveners. They traditionally focus on more humanistic topics such as group dynamics and process consultation as a way to build human capabilities and increase effectiveness. Achieving positive

outcomes requires situational and system understanding, while trust is built over time.

My longer-term access also amplified my awareness of my Western feminist perspective, how it might influence the project in Nicaragua and potentially a wide range of organisational activities. My influences of feminism come from two different camps. Primarily, I am a Liberal feminist who believes that the way to achieve gender equality is by changing the legal, social and cultural structures that constrains women's access to their individual rights (Bailey, 2016). Liberal feminism is criticised for its Global North origins and its emphasis on individual rights, I believe that sustainable change comes through the changing of social norms (Bailey, 2016). Another influence on my feminist, introduced earlier in Chapter Three, is that of Standpoint Theory. The important implications of social and political change I believe lies in the leveraging of knowledge situated in any particular context you are trying to change (Harding, 2012). Involving men and women in the dismantling of gender inequality from their own standpoints and knowledge, as difficult as that may be, I believe will bring more permanent social change.

Part of my own reflection as a development volunteer, sponsored by taxpayers in a 'wealthier' country, was that I would be perceived as an external 'expert' coming in with specific anticipated outcomes and indicators, probably decided without the input of local people. The aid agencies' culture of imposing expertise creates a corresponding perception that host communities are merely 'recipients' instead of customers or partners (Haddad et al., 2010). Additional negatives summarized about development volunteering summarized by Devereaux (2008) resonated strongly with me. These include that volunteers from the global North are inherently influenced by their home governments' neo-liberal politics and culture. Sponsoring agencies may have other political interests beyond social justice and poverty reduction. Volunteers from the North tend to be Caucasian, educated and middle-class, shaped and informed

by privilege, resulting in cultural dissonances. Many of the benefits from the project (interesting travel and personal development) are obtained by the volunteer, with fewer measurable outcomes received by the host organisation. Additionally, Northern management practices may not align well with local practices because the former tend to prioritize outcomes over relationships, while the latter do the reverse (Devereux, 2008).⁴¹ Reflection on these issues reinforced my commitment to allow the Agricultural Network stakeholders to shape how I would work with systems methodologies. I resolved to inspire them to accept, reject or adapt the Feminist Systems Thinking framework. If they accepted or adapted it, I hoped to create a tool that would have meaning for them.

In a meeting with the Senior Director who administered the Agricultural Network in the Caribbean Basin, we had the occasion to explore our ideas, hopes and concerns for my trip and plan some of my anticipated activities. The Senior Director was enthusiastic about inaugurating their first long-term volunteer assignment and being able to accomplish the initiative of “recruiting and managing volunteers for one-to-three month placements” (Global Development (Pseudonym), 2013a:n/a). There was also a sense of relief that my imminent arrival in Nicaragua would accelerate activity on reportable grant benchmarks, such as number of hosts completing the monitoring and evaluation documents. In addition, some of the tension, caused by the delayed Agricultural Network funding allocation without removing the need for first quarter reporting, would be released. This mutually beneficial arrangement of a three-month assignment would allow for a more suitable timeframe for my intervention. I would be able to become familiar with the needs and assets of the various relationships, programmes and systems. Additionally, I would engage with multiple actors, map the interrelated systems, facilitate and

⁴¹ In Devereux’s article he includes an extensive list of critiques along with providing positive evidence that responds to the identified concerns. Please refer to the full article for more information (Devereux, 2008)

encourage participatory practices. I hoped to empower leadership and foster a learning and reflective environment (Abercrombie et al., 2015).

With the expanded time frame verified with Global and Agricultural Network, the next step was to begin clarifying the specifics of the organisational development project I would be accountable for during my three months as a volunteer. These specifics included the assignment purpose, anticipated results/desired impacts and expected deliverables. Taking a holistic view, the Senior Director and I agreed that my research goals would be woven into the volunteer accountabilities. The decision to seamlessly represent both the volunteer and research work on a single assignment form was mutually beneficial. From Global's point of view, it meant they would be able to include my research activity in a quantifiable way for their reports to USAID. Global was thus able to demonstrate innovation due to the new long-term volunteer model. From my perspective, it ensured Global's commitment to a flexible timetable during my time in Nicaragua; it also gave my research equal value to my organisational development volunteering. After this initial discussion with the Senior Director, Global, the country office (in this case Nicaraguan Agricultural Network) and I wrote and fine-tuned my volunteer assignment form to identify the assignment purpose, expected results/desired impacts and expected deliverables:

"Assignment Purpose

- a. Demonstrate hands-on techniques / methodologies for interacting with farming communities, in particular, engagement and capacity development of women beneficiaries.
- b. Introduce the concept of Systems Thinking and its role in strengthening Agricultural Network efforts.
- c. Share community development skills, specifically about promoting women's inclusion and capacity development.
- d. Identify barriers to assessing need and integrating the work of Organisational Development volunteers.

- e. Identify and share process for the effective use of the Organisational Development Index tool.
- f. Provide support to Agricultural Network staff and volunteer teams in Nicaragua in the field” (Global Development (Pseudonym), 2014a:1).

Although the process of completing a volunteer assignment list like the above is a collaborative and a reflexive one, it is ultimately reductionist and systematic in nature because of its linear flow (see Figure 5.3 below), limiting a systemic analysis. This is especially relevant since the organisational development volunteer leading the intervention does not engage with the ‘project host’ they are being hired to work with until they arrive on location. The generation of the ‘assignment purpose’ in consultation with the farmers, country office and with the international NGO, may result in a more holistic understanding of the causal factors that may exist being overlooked.



Figure 6.2 - Global's Volunteer Assignment Process

This is equally true when it comes to the ‘contacting process’; establishing the scope of work for a volunteer to work with a host (or farm). The current contracting process begins when a ‘project host’, for example a small dairy and cheese farmer, requests a Global volunteer. The host requests a volunteer who can support/help his staff members to perhaps lower the amount of product that becomes contaminated. This is potentially a public health hazard. The farm team will already have received training on dairy hygiene and will have been given other sanitary processing tips. The ‘host’ may believe that the problem is with the group dynamics in his organisation. He therefore requests a

management consultant volunteer from the 'country office' to provide help. The details of the current status of the farm and its staff will be explained to the country office. The country office's primary responsibilities are to provide support to the volunteers once they arrive in country. The country office will write a remit based on what they have learned from the 'host'. The request is then sent to Global who recruits an organisational development volunteer and begins contracting with them about the details of the volunteer assignment. Although the process is iterative, often the organisational development volunteer does not have an opportunity to discuss the organisational needs directly with the 'hosts' who are the actual client, either because of language or technology hurdles. This systematic volunteer remit process sacrifices a key opportunity for improving a system by not fostering a systemic and critical discussion up front. Going back to Ison's (2010) systemic versus systematic thinking chart in Section 4.7.2, the process of Global's identification the boundaries of the intervention are systematic for there is a linear process in identifying the problem context and no feedback is incorporated. A more representative or richer understanding of the 'hosts' needs could have been achieved if there had been an feedback loop that included the Global, the host and the hired consultant (Ison, 2010).

This can lead to the unknowing marginalisation of some stakeholders and their concerns. The result may be a weak intervention plan that misses significant aspects of the problematic situation. Another result may be one that frames the problematic situation in a partial manner that could make the problem worse. This, again, is why boundary critique is so important (Midgley, 2000). Setting a remit ideally needs to involve the project host, the country office, the global HQ and the volunteer (Figure 6.1 above, dotted lines).

An additional regulating factor to narrowing the initial boundary analysis of my volunteer assignment was that Nicaraguan Agricultural Network was in the very early stages of launching a new country strategy. Previously, from 2008-

2013, the objectives in Nicaragua were focused on the dairy and horticulture sectors by “improving people’s lives through providing technical assistance at different points along the value chain, from production to consumption... chosen to maximize the impact of the programme and to reach as many people as possible” (Zaleski et al., 2013:37). Now, the primary country strategy for 2013-2018 was more targeted, still focusing on the dairy and livestock sectors; however, they would no longer work principally with small individual producers. Instead they would work with medium-sized cooperatives that had the capacity to better implement and sustain the technical assistance provided by Global. This resulted in a blend of work that represented Global’s ‘desired impacts’ and ‘deliverables’ and my research goals:

Table 6-1 - Lewis' Volunteer Assignment Form with Global Network

<p><i>Organisational Development Volunteer Impacts and Deliverables</i></p>	<p><i>PhD Research Agenda</i></p>
<p>1. Build capacity of Agricultural Network staff and hosts to understand and complete required organisational monitoring and evaluations with new hosts using USAID’s baseline data and Organisational Development Index tools.</p>	<p>6. Build capacity of Global, Agricultural Network staff and hosts using Feminist Systems Thinking as a means of mainstreaming gender equality into programme and organisational systems.</p>

2. Design interview questions to use with hosts to complete an Organisational Development Index tool with each host.	7. Identification of culturally appropriate indicators (beyond participation counts) for five-year dairy and water strategy to increase gender equality in Agricultural Network programme.
3. Submit volunteer trip report and recommendations.	8. Conduct orientation session(s)/ workshops with members of Agricultural Network staff and partner NGOs using Feminist Systems Thinking.
4. Identification of strategies for future volunteer teams in partnership with Agricultural Network staff.	
5. Identification of strategies for better continuity between distinct organisational development volunteers and their multiple projects in country.	
9. Raise awareness on how to increase gender equality in local Agricultural Network efforts.	
10. Strengthen relationships between Agricultural Network and new hosts.	
11. Convening, organising and facilitating groups.	

Table 6.1 above represents my summary scope of work for Nicaragua, which resulted from collaborative discussions with Global. The left side of the table, points 1-3, represent tasks that were typical of the things I had done on previous projects for Global. This is where I ultimately spent the majority of my efforts in Nicaragua (described in greater detail in Section 6.5.2). Continuing on the left side of the table, points 4 and 5 were my suggestions, as a way to boundary critique the perceptions, feedback and insight from Global organisational development volunteers from the previous Agricultural Network funding cycle. The right hand side of the table (points 6-8) represent my intended research areas. The last three points, 9-11, were activities that both Global and I felt would be mutually beneficial and would contribute knowledge to both our interests.

6.6 Chapter Conclusion

Systemic intervention is a dynamic and responsive methodology to adopt in research focused on strengthening gender equality at the individual, group, community, organisational and country levels. The pluralistic approach to methodology and method of a systemic intervention allows for the multiplicity of perspectives to be heard and included. In this context, to increase gender equality from geographically and culturally dispersed stakeholder groups.

Being bilingual and bicultural since childhood, I had a distinctive opportunity to become actively involved as a researcher comfortably constructing understanding with the people I worked with and met. My perceptions and understandings were filtered by my Latin ethnicity and my American nationality that at different moments provided me with a quicker understanding of the Nicaraguan culture.

The explicit inclusion of gender equality as a 'critical requirement' in both the USAID's Agricultural Network programme's 'request for applications' and Global's grant proposal written in response to the funding opportunity, sets an important context for my research on which to generate conversations with Nicaragua's country office (Global Development (Pseudonym), 2013a; U. S. Agency for International Development, 2013). Going back to the discussion about how Critical Theory influenced CST discussed in Section 3.3, the foundational arguments were ones based on enlightenment to drive social change resulting in a profound human awakening, challenging institutional constructs that control people's lives and choices (Bronner, 2011). Although the evidence of including gender equality in the Agricultural Network programme was clear (i.e. the language in the grant funding, the invitation to me as a researcher to address the topic), what I felt was missing was the deep critical reflection by management and staff about their role and influence to make those mandates systemic in their own work. The intersections between the different country programmes they managed, all considered 'developing' and the

persistent inequality for women (and other marginalised voices) , and the new funding for five years seemed like an intersection of opportunity. If the management side of the programme was not being critical and reflexive about gender equality, perhaps the local country staff would be.

Chapter Seven, Phase Two, introduces my role as an organisational development volunteer working in Nicaragua with Agricultural Network.

Chapter 7 Phase Two: Systemic Intervention in Nicaragua

Phase Two, now in Nicaragua, takes us from the abstract to the specific in one of my field roles, that of an organisation development volunteer. For clarity, my dual, embedded roles as a doctoral researcher and organisation development volunteer are rooted in a plurality that is emblematic of a systemic intervention. My role of 'researcher' is not monolithic in systems practice; therefore, I engaged daily in a variety of other roles (e.g. facilitator, consultant, volunteer, friend, mentor, etc.). According to Taket and White (1996:579), there are different "guises and characteristics" during a facilitation or intervention that are called upon in response to changing situations. I agree with their premise of needing to evoke different strategies when working with stakeholders who all have different personalities, fears, needs and perspectives. I am uncomfortable, however, with Taket and White's choice of adversarial terms, such as "the anarchist" who might "use opponents' arguments against them"; or "the rebel" who might operate with "moderation" and their third guise "the trickster" who might engage in "constant deconstruction of themselves and their actions" (Taket & White, 1996:579). The imposed power undercurrents implied in their terms are not ones I would adopt. I prefer to be more transparent (when possible) with my assumptions and roles in the room. I encourage stakeholders to do the same.

Yet, the diversified roles approach in systems practice were certainly helpful for me in my primary role as a researcher. I deemed my organisation development volunteer activities throughout my fieldwork as representing my commitment to plurality. The organisation development tasks with the NGO staff was to orient and gather baseline data from new 'hosts'⁴². Fortuitously, it also provided me access to broad stakeholder groups in two countries. This

⁴² Hosts defined by USAID as: "An individual or organisation that receives technical assistance services and serves as the focus of the volunteer's work. Examples include an individual farmer, a cooperative, a bank, an agribusiness, or a department in the ministry of agriculture" (U. S. Agency for International Development, 2013:5)

ultimately led to the co-creation of gender equality indicators that were embedded into Nicaraguan Agricultural Network's programme.

Moving my field study to Nicaragua had research implications. I had little opportunity to conduct theoretical research on the country's history. I knew very little about Nicaragua, and what I did know was dated and biased. Most of what I did know I had learned in my 20s by reading and watching the American media which at the time was reporting on the Nicaraguan Revolution and the Contra War (Babb, 2001a). I did have broad knowledge about gender equality issues within some Latino cultures, but not specifically Nicaragua.

At the beginning of any consulting project or intervention, my process is typically the same. I begin to build relationships and introduce my role as a 'thought partner'. A thought partner is someone who facilitates learning with individuals and organisations. Being a thought partner relies on skilful use of inquiry and reflection to build capacity of individuals and organisations by stimulating their thinking, assumptions, paradigms, and actions as a means to encourage innovation and transformation. What this looks like in the field is to work with people to identify goals, objectives, outcomes, barriers, challenges, opportunities and associated activities through a series of conversations, building meaning between myself, colleagues and stakeholders. Living in a world of meaning shaped by our experiences within families, cultures, and personal histories means it is important to begin my projects by creating shared meanings, which also often builds trust.

In development projects, building these shared meanings has challenges. It is incumbent on me to represent the funder's explicit and implicit goals and objectives. In addition, I must account for what local people want for themselves. Ultimately for me, my moral priority is to partner with the *primary* stakeholders (i.e., those affected, to use the language of Ulrich, 1983). More often than not, the primary stakeholders are living in rural and less affluent communities. My moral priority is to see what they perceive their needs and

priorities to be. My role is one of a cultural translator, facilitating a shared definition between ‘funding’, ‘funded’ and myself as a researcher.

Typically, the early discussions with the funder and/or primary stakeholders lead to some set of agreed upon activities based on assumptions, projections, expectations, beliefs, budgets, time-frames, biases, deadlines, vested interests or previous practice (Montoya, 2012; Carvalho et al., 2015). Primary stakeholders in a country usually want to focus on the assets they will receive for their investment of time, whether in the form of new skills, new technical practices or a physical inventory. According to Carvalho et al:

“A common weakness at this stage [project design] is to overestimate how much can be achieved in the particular country context. The project theory or results chain may be technically sound and logical in generic terms, but it may fail to account sufficiently for country specific conditions, including constraints in implementation capacity or political obstacles to smooth implementation” (2015:2).

Over-estimating what can be accomplished in the time allocated is a weakness with which I am very familiar. No matter how well prepared one tries to be, in an attempt to anticipate what tools one might need once in a country, the assumptions made prior to arriving are just that: unexplored assumptions. As I entered this second phase of the intervention, I had obligations with Global along with my own research demands. What was not clear, and would continue to change over time, was how these two missions (my volunteer and research demands) would evolve. Would they intersect effectively? Who would be the ultimate stakeholders? How would I gain access to the right stakeholder groups? Who were the right stakeholders anyway? What other constraints or opportunities might surface? What outcomes (if any) would unfold?

7.1 Chapter Structure

Chapter Seven has nine sections, with the first section (this one) explaining how the whole chapter is segmented to create a narrative of Phase Two of my systemic intervention in Nicaragua. Sections 7.2 and 7.3 introduce a brief history of Nicaragua's relationship with the struggle for women's rights, beginning after the end of a 35-year oppressive dictatorship via the revolution and subsequent Contra War. The next two sections, 7.4 and 7.5, will introduce the Nicaraguan Agricultural Network programme, the NGO I partnered with, along with their local circumstances, and my OD volunteer work that focused on gender mainstreaming. Section 7.6 presents the culminating week of my volunteer efforts with the arrival of the University of the North's monitoring and evaluation team⁴³. During this week, the Nicaraguan Agricultural Network staff, the Global Programme Officer, the North's monitoring and evaluation team and I collaboratively created a logic model which included gender indicators. Section 7.7 then presents reflections from telephone interviews with stakeholders gathered a year post fieldwork (2015). Section 7.8 summarises the methodological learnings that occurred during phase two. Section 7.9 concludes this chapter.

⁴³ North's team consisted of three members. Two lead evaluators, one who had expertise and a junior staff member.



Figure 7-1 - Southern Mexico and Nicaragua in Central America

7.2 Setting the Context: Nicaragua

After a delayed start to my research, I arrived in Nicaragua in late March 2014. Nicaragua is geographically the largest country in Central America, hugged by the Caribbean Sea to the east and the Pacific Ocean to the west. Its landscape is characterised by volcanos and lakes. Honduras is its northern neighbour and Costa Rica is on its southern border (Figure 7.1 above). It has a multi-ethnic population (e.g. indigenous peoples, Europeans, Africans, Asians and those of Middle Eastern origin). Spanish is the predominant language. The prevailing religion is Catholicism. This does not, however, represent the full diversity of the country because it also includes indigenous communities and languages along with a diversity of religious affiliations (Lewis, 2014b).

The country still bears a shroud of mystery for many outsiders. Arguably, this is because of Nicaragua's historical political struggles, including the level of foreign intervention there, primarily from the U.S.A. and U.S.S.R. (now Russia). In 1979, a 43-year dictatorship (1936-1979) controlled by the U.S. backed, right-wing, Somoza Family dynasty was overthrown by the Sandinista National

Liberation Front rebellion (FSLN in Spanish)(Kampwirth, 1996). What began as a revolutionary movement in the 1960s and 1970s became a triumphant State party in the 1980s and an opposition party in the 1990s. Currently, and perhaps for the foreseeable future⁴⁴, it is the re-elected political party governing since 2006 (Molyneux, 1985a; 1988; Kampwirth, 1996; Babb, 2001a; Heumann, 2014).

The Contra War in the 1980s during which American-backed rebels tried to overthrow the Sandinista government, like the revolution previously, created a demand for more combatants. This shifted the customary division of labour between men and women, which now needed to be more responsive to support the escalating warfare (Kampwirth, 2001). Female and male guerrillas created new social norms (as Sandinistas and Contras) where women now had more visible and explicit access to power, leadership and calculated strategy within the resistance movements (Cupples, 2004). Yet even with these shifting gender norms, gender equality would remain elusive (Horton, 2015).

7.3 Nicaragua and the 'F' Word (Feminism)

In modern Nicaragua, even though 25-35 years had passed since the end of Somoza's family dictatorship and the subsequent Contra War, references to 'the revolution' by different people I worked with were frequent. Partly, I believe it arose because I was an '*extranjera*' (foreigner) or perhaps it was due to my U.S. nationality. Other times the wars were recollected to explain the current state of certain communities. Accounts like "this community is very collaborative, they sheltered a guerrilla stronghold during the revolution" or "people in this region suffered greatly during the revolution" were soon to become common references. This was regardless of the geographic region, race, ethnicity, gender or social class with which I was working. This underscored for me that the

⁴⁴Daniel Ortega, an original Sandinista guerrilla involved with the overthrow of the Somoza dictatorship, was re-elected as President of the country in 2011. In 2014, the National Assembly, dominated by the FSLN, approved constitutional amendments that abolished term limits for the presidency and allowed a president to run for an unlimited number of five-year terms. Critics charged that the amendments undermine and threaten democracy (Wikipedia, 2015a) .

people of Nicaragua had lost half a century of potential growth and productivity because of the wars, as well as the emotional toll that any armed conflict leaves in its wake. I was also reminded that change is an organic phenomenon, full of ebbs and flows of progress and regression. It was significant to consider Nicaragua's turbulent past was ever present.

For many reasons, I needed to remain acutely sensitive and reflective about how I approached gender equality topics, not least because of my U.S. passport affiliation, my white privilege and Northern roots. Remaining deferential was paramount, for this was their country and culture to change, rather than mine. Although I did not want to forcefully impose my feminist beliefs, I did want to stimulate thoughtful conversations about opportunities for change.

Since the early 19th century, Nicaraguan women have been organising themselves in the name of gender equality. These struggles are discussed in studies⁴⁵ beyond the scope of this study, but some milestones will be helpful to review. In the 35 years since the dictatorship, continuing efforts have been taken to transform the country's social infrastructure and agrarian policy. Work has been done to solidify Nicaragua's position within the global political landscape, with some referring to the country as the "new Latin American left" (Jubb, 2014a:257). The successful revolution against the Somoza dictatorship included as many as 30% female guerrilla soldiers; some were in leadership roles. During the revolution, the women were asked to subsume their personal identities and be "united against the dictatorship, and differences of class, age, and gender were transcended" (Flynn, 1983; Molyneux, 1985b:228). Even with their initial inclusion as revolutionary guerrillas, Nicaraguan women's

⁴⁵ (Rich, 1984; Molyneux, 1985b; 1988; Chinchilla, 1995; Kampwirth, 1996; Alvarez et al., 1998; 1998; Alvarez, 1999; Craske, 1999; 2001d; 2001e; 2001a; Craske & Molyneux, 2002; Chant, 2003; Kampwirth, 2003; Cupples, 2004; Kampwirth, 2004; 2006; 2008; 2010; Flores & Bastiaensen, 2011; González-Rivera, 2011; Cupples, 2013; González-Rivera, 2014; Lacombe, 2014).

relationship, post revolution, with women's rights and the broader feminist agenda has been complicated.

Nicaragua is similar to many other Latin American cultures rooted in and subjected to European colonialization. This concentrated paternalistic legacy has created organisational and societal patterns that influence politics and women's rights. These patterns include limiting access to power, influential networks, decision-making, resources, leadership roles and gender equality (Cupples, 2013; Robles, 2014). After the revolution in the 1980s, an initial aim of the Sandinista government was to encourage the creation of democratic families and to include constitutional equal rights for women (Sternberg, 2000). The relationship between feminists in the global North and the South is fraught, leading to Northern characterisations of the current FSLN government, which seems to be back in power indefinitely, as "openly anti-feminist" (Heumann, 2014:334). Central to this tension is the government's mobilization against sexual and reproductive rights. Foremost is a 2006 change in the law that made all abortions illegal, including therapeutic ones in response to a rape, or to save a woman's life (Kampwirth, 2008). I will return to these issues of 'anti-feminism' below.

As in many countries, there is a tension in Nicaragua between those who support feminist values, including reproductive rights, and those who are perceived as pro-family, pro-life or "antifeminists" (Kampwirth, 2006:74). One distinction to note is that, for Nicaragua, these world views have both domestic and global origins. The nuances in the complex topography of feminism in Nicaragua are vast, but an abridged review of some of the key issues is helpful.

From the domestic perspective, many antifeminists attribute the changing roles of women and the loss of 'family' or 'traditional' values as an outgrowth of the Sandinista movement. It recruited women and youth during and after the revolution to take on non-traditional roles such as being literacy coaches, inoculating children and harvesting coffee. These new experiences, many of

which required women to go to other regions of the country, introduced women to the idea that social inequality could be changed or influenced. These experiences opened them to alternative ways of being and thinking beyond their parents' and communities' influences (Kampwirth, 1996; 2006; 2008). Another perceived loss for the antifeminists was the blurring of the lines of traditional marriage after the Nicaraguan constitution was changed in the 1980s to recognise common-law relationships as equal to marriage⁴⁶ and to permit unilateral divorce. Conservatives responded to this new consciousness, promoted by the Sandinistas, by saying the changing values were problematic.

“We don't talk about changing values; we think there is a loss or absence of values. We try to recuperate values, in contrast I think the feminists really are trying to change values...” (Asael Perez, executive director of a pro-life organisation, interviewed by Kampwirth, 2006:81).

Using a global lens, the onset of structural adjustment programmes (SAPs)⁴⁷, controlled by the global North as a means of 'restructuring' escalating Southern debt, forced Nicaragua (and other countries) to roll back state-funded social services or to privatize them. The SAPs also imposed other constraints (as discussed in Chapter Four), which adversely and disproportionately impacted women and children (Walby, 2007; 2009; Bennett, 2014). This reduction in the supply of social services resulted in increased demands for support, which were sometimes then fulfilled by international NGOs (e.g. the UN Development Programme). These NGOs were seen as bringing in 'global' values such as population control programmes: “... the Nicaraguan government has been forced, by international lending agencies and by the international health establishment, to implement policies that violate Nicaraguan values” (Kampwirth, 2006:84).

⁴⁶ Many people in rural communities had common-law arrangements.

⁴⁷ For a review of SAPs, see Section Chapter 4.3.

I gained an appreciation of this binary relationship with gender issues when I used the term 'feminism' while introducing my research to three different groups of stakeholders: first, the Nicaraguan Agricultural Network Country Director (male); secondly, the Nicaraguan Agricultural Network Programme officers, both of whom were female; and third, a mixed-gender group at the Agrarian University. During a preparatory phone meeting with the Nicaraguan Agricultural Network County Director and Global's Programme Officer while I was still in Washington, the Country Director expressed enthusiasm, during our phone conversation, about receiving unforeseen support with both gender equality and the Network's baseline data gathering:

"Within the Agricultural Network programme the topic of gender is weak but within our country it has been worked on extensively. I believe Nicaragua has been recognised for having the most women in elected positions. There is a political push for women to take their role in society. This is particularly interesting in the livestock sector, not as protagonists, but women are much more efficient in the laboratory and routine analysis [of sanitary standards]. There are some cooperatives whose members are all women. We [Agricultural Network] have never focused on gender in specific in the last five years and this is a perfect opportunity to have Agricultural Network bring this information to us" (Nicaragua Agricultural Network Country Director, 2014).

The Country Director's comments indicated an interest in supporting the integration of gender equality into his group's work, plus an awareness of the national context of Nicaragua's gender efforts at the sector and country levels. I did wonder about his essentialist comments about women being more "efficient" and detail-oriented. Because it was our first meeting and conversation, I did not probe deeper. I knew that conversations with funders and staff are often diplomatically delicate. Since this was an official phone call, I

wanted to wait for more informal face-to-face discussions to clarify understandings.

Once I was physically in Nicaragua, I gradually discovered more about the different world views and the discomfort with both gender and feminism. During an informal conversation with Agricultural Network's programme staff (young, middle-class and educated women in their 30s, and examples of gender equality in agricultural positions commonly filled by men), their disapproving reactions to their country's feminist movements surprised me. They were swift in expressing mistrust and suspicion of potential ulterior motives. One of the women described the women's rights campaigns in the 1980s and 1990s as "violent". (Some of these activities I later learned had occurred before they were born, but impacted their parents.) They explained that many NGOs were using the women's movement to advocate for issues that were essentially not pro-women, but were actually "anti-men". Their belief in equal pay for equal work was seen through a human rights lens, not a feminist one.

A related unease involving the term feminism occurred at an initial meeting with a group of new colleagues from the National Agrarian University (UNA). The meeting was attended by UNA faculty and Masters' students, who were due to launch a series of business development workshops in two southern, rural and low-income communities. As we discussed my research, they responded to my request for suggestions for cultural adaptations to the Feminist Systems Thinking framework. Their first, unanimous and emphatic recommendation was to drop the 'F' word (feminist) from my spoken and written language. They urged me merely to use 'systems thinking' in my workshop synopsis. Their comments were consistent with other explanations I had encountered, attributing negative qualities to feminism, such as being 'anti-men', 'too harsh' or 'politically loaded with historical meaning'. The latter was a common thread I was beginning to recognise.

Having heard allusions to historical discourses relating to the idea of feminism from several people, I discovered a substantial amount of research acknowledging the various debates. For example:

“By the early twentieth century, some urban women in western and central Nicaragua who supported women’s suffrage started calling themselves feminists... By the 1920s, larger numbers of women started to adopt the term. By ‘feminism’ I mean the support for women’s civil and political rights, accompanied by a personal stand against male domination in other areas of life. Moreover, I am careful to label as feminists only those women who used the label for themselves...” (González-Rivera, 2011:23; 2014).

“There was a [Sandinista] discourse about women but I think there was as strong fear of the word ‘feminist’. I think that more than anything it is a fear of losing power, of having to share power with a woman” (Hazel Fonseca, Nicaraguan women’s activist, Kampwirth, 2010:111).

“In the women’s movement a dominant frame on women’s rights is inevitably influenced by the Sandinista discourse on class inequality. Women’s issues are seen as part of a general problem of economic and social marginalisation. This frame is embraced mainly by women’s rights activists who do not self-identify as feminists but has also strongly shaped the discourse of activists who do identify as feminists. Women are seen as a particularly vulnerable group among the poor as victims of both poverty and machismo. Within this discourse, women’s lack of sexual and reproductive autonomy is seen as problematic primarily because and insofar as women are seen as ‘victims’ and in need of protection” (Heumann, 2014:338).

The remnants of decades of adversarial legacies, formed between the women’s movements and political parties, had created a societal weariness in Nicaragua concerning feminist activism. There are two historical views on values and ‘anti-values’ shaping current debates on gender equality. One

viewpoint, a feminist one, is an outgrowth of the revolution where the diversified work opportunities and access to political voice for women encouraged active campaigning for less domestic violence and more egalitarian values (Kampwirth, 2006). The other viewpoint, a more traditional reaction, is that Nicaraguan values about equality have always been characterized by mutual respect and compatibility, not hallmarked by conflict and inequality (Kampwirth, 2006). According to the antifeminists, the problem then became the subsuming of these traditional values into 'anti-values', as a means for ending the current problems with inequality and violence against women (Kampwirth, 2006). In other words, traditional concerns with equality and mutual respect actually came to be seen as opposed by feminism, even though the feminists themselves would likely claim to be champions of equality.

This conflicted history was exemplified in my conversations with women in several of my stakeholder groups. The Agricultural Network Programme Officers were strong, independent single mothers who valued equality as an ethical concept. They did not fully see or accept, however, that they had an explicit accountability for gender equality in their functions as employees funded by USAID.

Optimistically in the domestic policy from the Nicaraguan government, the National Human Development Plan (NHDP) 2012-2016, there was policy guidance on gender equality, with an injunction "to continue to transform Nicaragua" (National Frente Sandanista de Liberacion, 2012:2). I became aware of the law from one of the Programme Officers, who was justly proud of the Nicaraguan National Council's efforts. In Chapter Eight, "The Common Good and Social Equity of Nicaraguan Families" and the "Policy for the Development of Women", the report lists two key undertakings: "leadership and empowerment and the promotion of gender equity in leadership positions in political, trade union and community work fields" (National Frente Sandanista de Liberacion, 2012:93, translation). The plan was not explicit about how the

undertakings would be accomplished with no corresponding funding allocation included in the NHDP. Despite the Agricultural Network Programme Officers' sense of pride that their country had legislation which included women's rights, they Programme Officers were unsure that it played a role to support their efforts to include more women in the Agricultural Network programme. They felt the policy work was too far removed from their work in the field.

It was evident that at the local level, the Agricultural Network staff were knowledgeable about their country's current and past struggles for women's rights. They did not seem to consider that a possible reason why they, themselves, enjoyed professional jobs in the agricultural sector (customarily and predominantly held by men), could be attributed to the historical actions of their country-women's battles for equality.

From a U.S. policy perspective, it was true that the Agricultural Network staff, like other international NGO staff before them, were once again being economically ensnared by policies, values and assumptions emanating from outside their culture. The personal dilemma for the Agricultural Network staff was that they were paid salaries by funding that was political and thus had proverbial strings attached. The language in the 105-page report called the USAID/Nicaragua Gender Analysis Report (U. S. Agency for International Development, 2012a) delineates U.S. Gender Policy. This report details recommendations for planning, designing, implementing, monitoring and evaluation in depth. The realistic barriers and identified gaps within the report could provide guidance for Agricultural Network's efforts. Laws on gender equality and gender-based violence were weak or non-existent. Women and girls do not routinely have access to the male-dominated public and private spheres of decision-making, especially at local levels, despite their representation in Parliament. Finally, women and girls, ethnic and linguistic minorities and members of the lesbian, gay, bisexual and transgender (LGBT)

community generally lack self-esteem and knowledge of their own rights (U. S. Agency for International Development, 2012a).

When I asked the Programme Officers if they were aware of the gender policy and practice expectations of USAID, they presumed they had met the criteria; the 'gender box' was ticked already because both of the Programme Officers were women in non-traditional roles in agriculture. Upon reflection, both of the policy documents discussed above, one domestic and one international, were not discussed and explained to the staff. Both documents were too remote from the staff's day-to-day working lives to have much influence.

In retrospect, the very knowledgeable and hardworking staff, who were *not opposed* to gender equality practices being considered for their work, did not know what those activities could look like and needed time to create their own strategies. The conversations we had about gender were mostly informal, with two formal meetings where the topic was on the agenda. Unfortunately, the Agricultural Network programme focuses on volunteers arriving in the country to build the capacity of the 'hosts' and allotting time for staff development on gender equality was not one of their express objectives.

Over the months, however, the discussions with the staff about gender quality did get codified. In a document in which staff had major input and influence, and which would subsequently guide their work over the five-year grant: the *Nicaraguan Agricultural Network Country Project Strategy for Livestock and Dairy* (Global Development (Pseudonym), 2014b) a co-constructed logic model was included. This became the basis for the identification of measurable indicators and impact. The staff were then able to report quantitatively and qualitatively on measurable indicators on a quarterly basis.

This project strategy document came to life during the monitoring and evaluation week (described in Section 6.6) where the logic model was methodically developed collaboratively between the Nicaraguan Agricultural

Network staff, the monitoring and evaluation team from the U.S., and myself. Gender indicators were created by staff, such as the number of women in leadership positions and getting women's opinions on when and where to hold capacity development workshops. I had intended to include the final logic model, but as permission was not received from Global, it does not appear in the appendices of this thesis.

7.4.1 Gender Analysis Nicaragua

As a way to begin to analyse gender equality in Nicaragua, it will be helpful to review the UN indexes on human development introduced in Chapter One, the UN's Human Development Index (HDI), the Inequality-adjusted HDI (IHDI) and the UN Gender Inequality Index (GII). As a reminder, when considering a country's human development as ranked in the HDI index, there is another index that overlays inequality on the HDI which then "discounts" each dimension (in life expectancy, education and income), resulting in a different ranking of 86 for Nicaragua on the IHDI (United Nations Development Programme, 2013b). The companion instrument to the HDI and the IHDI adds gender (GII) to the analysis. On the GII, Nicaragua is ranked at 89 out of 186 countries in the 2013 index (United Nations Development Programme, 2013a). If a country receives a low score on the GII, it impacts its rating on the Inequality-Adjusted Human Development Index (IHDI), which takes into account both gender *and* inequality measures (United Nations Development Programme, 2013a).

Importantly, a higher GII value indicates higher inequalities and thus a higher potential loss to human development. Nicaragua's ranking is based on the following factors; approximately 40% of its parliamentary seats are held by women, 31% of adult women have achieved at least a secondary level of education (as compared to 45% of men); for every 100,000 live births, 95 women die in childbirth and for every 1000 live births to adolescents, 100 adolescents

die in childbirth. Women in the labour market participate at a rate of 40% compared to men at 80% (United Nations Development Programme, 2014b).

According to a USAID sponsored report (2012a) and other research, such as the previously mentioned UN indexes, Nicaragua has made significant progress over the last 20 years in poverty reduction, gender parity in education, maternal and child survival and health, reduction in the national birth rate and increase in contraceptive use (Perez et al., 2012; U. S. Agency for International Development, 2012a; Jubb, 2014b). What still remains tenuous, however, is women's control over assets, decision-making, access to justice in the courts and reproductive rights and parliamentary leadership (Andersson, 2015; Milward et al., 2015). Consistently, gender disparities are more pronounced in rural, ethnic and linguistic minorities in the eastern coast and northern regions where poverty rates are higher (U. S. Agency for International Development, 2012a).

Policy experts within USAID have suggested that "all development objectives integrate the following outcomes":

- "1) Reduce gender disparities in access to public and political decision-making spaces and positions at local and regional levels,
 - 2) Reduce cultural acceptance of gender-based violence; and,
 - 3) Increase capability of women, girls and boys, particularly from ethnic and linguistic minority populations, to realize their rights, determine their life outcomes, and influence decision-making in households, communities and societies"
- (U. S. Agency for International Development, 2012a:11).

I realized the applied research phase of my doctoral research highlights the implications of Northern knowledge systems being imposed on countries being offered development funding which comes with prescribed expectations, often not grounded in local realities or input. What I mean by this, is that although USAID official documents are explicit in prioritising gender equality, the manifestations of these priorities were harder to detect.

While working on Phase One in Washington, D.C. there was an expressed interest to include a gender equality focus throughout the Agricultural Network efforts in Nicaragua. What I began to understand was that it was more an “integrationist” (addressing gender issues through existing development policy paradigms) approach of gender mainstreaming versus an “agenda-setting” approach as recommended by gender experts who look to leverage change on many fronts:

“...in decision-making structures and processes, in articulation of objectives, in prioritization of strategies, in the positioning of gender issues amidst competing, emerging concerns, and in building a mass base of support among both men and women” (Jahan, 1995:126).

This integrationist approach, while a less disruptive to the current programmes in place and its established programme objectives and norms, are also less likely to bring transformative systemic change. Based on the theoretical research conducted for this applied stage, I was looking to identify what gender equality efforts were in place within the Nicaragua’s Agricultural Network (introduced in the next section) and look for areas for collaborative work for improvement to enhance the authentic inclusion and voices of women in decision-making (from all stakeholder groups); look at the institutional structure’s use of gendered power that might be playing a role in sustaining barriers to change; locate gender analysis tools which might be generating and disseminating gender-disaggregated and how their efforts might be improved to represent current best practices (national and international); what existing women’s organisations would be interested in partnering (through collaboration, mentorship or coaching) with my research; and lastly, what practical requirements were necessary to effectively improve gender equality outcomes for the programme (Beveridge et al., 2000).

Boundary judgements are also central to Midgley's notion of a process philosophy¹, an iterative reflective process which uses two primary boundaries called "first order" (looking outward) and "second order" (looking back) (Midgley, 2000). Midgley (2000:80-81) claims: "it is possible to make a variety of boundary judgements when looking 'outward' towards the world, and a variety of judgements when looking 'back' at the knowledge generating systems which produce these 'outward' judgements.

7.4 Nicaragua's Agriculture Network Programme

Nicaraguan Agricultural Network's organisational mandate, a set of recently approved project strategies for the next five-years (2013-2018), focuses on livestock and the dairy sector. The primary strategy, in which my fieldwork was embedded, is to increase the productivity and the income of small and medium scale producers in the livestock and dairy sector. Upon my arrival, the staff consisted of a Country Director, a Programme Officer and an administrative assistant. A second Programme Officer was hired in May. The Country Director, a respected veterinarian, worked part-time with the Nicaraguan Agricultural Network as well as maintaining a full-time management position at a national livestock authority. The Programme Officer worked full-time in the field office and was currently the only field staff working on the new grant. The Nicaraguan Agricultural Network office typically has two Programme Officers; they had been short-staffed for more than six months. This pressure point became evident as I began to work daily with the one and only Programme Officer.

Embracing Midgley's process philosophy to identify boundary judgements was challenging in this phase. As a reminder, my arrival in Nicaragua coincided with the initiating of a new five-year funding cycle with different strategies and anticipated outcomes. The previous five years the Nicaragua office had work with small rural, mostly dairy farmers. Now they were to build new partnerships with larger dairy cooperatives who could better respond to

the technical assistance that Agricultural Network could provide. Conducting a first order judgement with the staff resulted only in a partial and now 'historical' view of the partners they had worked with. Each previous host/partner would need to be met with and consideration be made to the new strategies from Washington. A collaborative and reflexive process between the staff and the previous hosts, it was often unclear to both the staff and the hosts if they met the new criteria. The resulting hosts selected for inclusion in the new funding cycle changed from week to week as ongoing conversations were held and agreements made.

A primary focus of the first six weeks of my assignment as an OD volunteer was the translation of the USAID baseline tools. Once this was done, we began to travel throughout the northern part of the country to administer the tools. The Agricultural Network programme distinguishes between two types of relationships to deliver the agricultural programme: 'hosts' and 'strategic partners'. Hosts are small and medium enterprises (e.g. farmers, farm groups, and agribusinesses). Strategic partners (e.g. universities, governmental agencies, NGOs) are organisations that have the interest and the capacity to support Nicaraguan Agricultural Network volunteers in their field assignments. For example, the Peace Corps, which has over 150 volunteers in Nicaragua, could act as a strategic partner while working on two year contracts.

What I found curious was that most of my volunteer activities were channelled through the Programme Officer, the assigned 'gatekeeper'. The gatekeeper was someone who filtered questions and initially decided what to share with the Director, but in actuality had very little direct authority (Tracy, 2013). Although I did realise her authority was limited, I knew she also was very interested in the project and was keen to learn more about how FST might support her work in the field. She indeed was a gatekeeper, but I also knew that on this project there would be many people holding that role, based on the different stakeholder groups I would be partnering with, so my emphasis was

on observing, learning and building relationships. My interactions with the Country Director were very limited, for his primary employment was with the livestock authority, which was located in a different part of the city. That is not to say that he was not 'present', for he was in frequent daily contact with the Programme Officer, making plans and giving instructions concerning our day's activities. My difficulty was that I never knew from one day to the next what the activities would include. Agreed plans from the prior evening might shift either slightly or completely by the next morning. The strategy and planning was top down. When I asked for clarification or suggested alternative strategies, these questions or suggestions were relayed to the Country Director before feedback or decisions were provided. Part of me wanted to create more clarity on how decisions were made concerning my work. I opted to remain in an observer role at this early stage as a way of understanding the organisational culture. Midgley, (2000) makes a case for observation being a tool for intervention, useful for particular purposes.) I admired and trusted the Country Director, who was mostly transparent about his thoughts. At the onset of working with this team, I saw how much he respected and trusted his Programme Officer. This allowed her to be the official 'face' at most meetings with potential community partners. At the same time, it was a new way of working for me. An additional worry with this hierarchical communication paradigm was that it was difficult for me to discuss project strategies. Further, this style made it difficult to identify my potential pool of stakeholders beyond the potential 'hosts' to whom I was slowly being introduced.

7.5 USAID's Baseline Assessments

In the end, the process of identifying and interviewing hosts and strategic partners using the USAID tools contributed to my research in an unexpected way. Ultimately, after conducting nine interviews over two months with hosts and strategic partners (see Table 7.1 under the column 'Relationships with Nicaraguan Agricultural Network'), it was apparent that many did not meet the

criteria of the new Agricultural Network funding cycle. The problem was that they were either small businesses (e.g. single family enterprises) or were intermediaries (e.g. the Peace Corps and the Chamber of Commerce). New hosts were being identified sporadically, sometimes weekly. Once they were made known to the programme officer and me, we would make appointments to visit them. The rural and remote locations were anywhere from one to three-hour day trips away. Of the nine hosts interviewed, only two ultimately participated and were able to join in the Feminist Systems Thinking workshops (see Chapter Seven).

Table 7-1 - List of Agricultural Network Hosts and Strategic Partnerships

Location	Stakeholders	Relationship with Nicaraguan Agricultural Network		Activities They Participated In	
		Hosts	Strategic partnership	Phase 1 OD Work	Phase 2 Feminist Systems Thinking Workshops
U.S.A.	Global Staff			x	x
	Monitoring and evaluation team			x	
Nicaragua	Agricultural Network Nicaragua Staff			x	x
	Monitoring and evaluation team			x	
	National Dairy Chamber of Commerce		x		x
	National Livestock Commission			x	
	Peace Corps		x		
	UNA: Agrarian University		x		x
	- Camoapa Satellite				x

	Campus				
	- Train the Trainer				x
	- Boca de Sabalo (rural SMEs)				x
	- San Carlos (rural SMEs)				x
	Dairy Cooperative #1 El Truinfo	x		x	x
	Dairy Cooperative #2 Rivas	x		x	x
	Dairy Cooperative #3 San Tomas	x		x	
	Independent Chile Sauce Farmer	x		x	
	Independent Cheese Farmer	x		x	
	Independent Dairy Farmer	x		x	

Initially, I did not realise that the selection of hosts was provisional and that our trips into the rural regions were primarily for recruitment for the new funding cycle. If the organisations contacted expressed interest, an orientation was done. Then the enrolment process began in earnest by filling out the baseline forms. Not all orientations resulted in new hosts for varying reasons. Sometimes the organisations did not have the capacity to support and coordinate with external experts. Sometimes they were too small to add significantly to the value chain in the dairy and livestock sector.

As the weeks progressed, Agricultural Network and I became clearer about the type of hosts the programme wanted to recruit, focusing on larger cooperatives and *only those with management teams*. The decision not to engage with the rural farmers was based on the programme's experiences in the prior funding cycle where the impacts on increasing dairy production were minimal. By working with the next level up in the value chain, Agricultural Network was in alignment with the new country strategy of working with hosts who were

“economically viable and [who] have a competitive advantage while addressing bottlenecks” (Global Development (Pseudonym), 2013a:n/a).

The programme shift from individual farmers to dairy cooperatives meant I needed to find another way to access my intended rural stakeholders. I had come to Nicaragua for the opportunity to work with rural communities where women had few opportunities and where there was a high level of poverty. Additionally, I hoped to work with groups among whom gender inequality may not be recognised as a concern. This is often the case in rural locations where gender issues are perceived as ‘cultural’ and hence not subject to intervention. From the literature (Lyons, 2015; Openjuru et al., 2015) and my own experiences, I recognise that there is a need to engage the community widely in the quest for gender equality. It is necessary to ensure that every family member has equal access to information, decision-making and the input of knowledge as a means of bringing about wider long-term changes.

“In both public and the private life worldwide, men have a significant and undeniable role in the socioeconomic progress of women. Ignoring men in the design and implementation of gender-oriented policies may not only limit the effectiveness of these policies but also exacerbate existing disparities” (Farre, 2013:23).

Once it became evident that I needed to find additional stakeholder groups who matched my research criteria (I would still involve the management teams that expressed interest), the Programme Officer helped me identify another possibility working with the *Universidad Nacional Agraria* (National Agrarian University/UNA) in Managua, described in Chapter Seven. The time spent, however, with the prospective hosts informed my boundary critique and understanding of how FST could be adapted to respond to the diverse viewpoints on gender roles and gender equity. Even though gender equality was not part of the official baseline instruments, I would introduce the topic

when I saw an opportunity to get a range of perspectives. All the ‘hosts’ whom we met during the induction meetings, for example, were very comfortable discussing their reflections on their country’s gender equality challenges:

“Mostly men work on the farm. All the men spend their money on alcohol. We try and hire as many women as possible. If you give women the money [for work], it goes to the family. I would like to change the *machista*⁴⁸ mentality in my community. By giving them [women] jobs, that starts the change” (Lewis, 2014c, male entrepreneur, cheesemaker).

“Sometimes the men make it difficult to recruit the women to participate in activities [outside the home]. Sometimes it is easier to recruit women through processes where the idea surfaces from the activity” (Lewis, 2014c, male executive, Peace Corps).

“I want to work with cooperatives, and particularly those that have women members. I also only look for organic farming and hiring local people”(Lewis, 2014c, male entrepreneur, chilli sauce producer, translated from Spanish).

“For women to take an equal part of the business, the husband has to be dead first [said facetiously]. Whether it is because of culture or tradition, the men have been the tenders of the earth. There are some women that run the [dairy] business, but it’s very, very few. The workshops we [the cooperative] offer are usually only attended by the associates [of the cooperative], who are typically men” (Lewis, 2014c, male executive, dairy cooperative, translated from Spanish).

⁴⁸ Machista/Machismo can have a multi-dimensional ideology (negative and positive qualities) in most Latin American cultures, yet there is no specificity about its definition. “A traditional masculinity ideology serves to uphold patriarchal codes by requiring that males adopt dominant and aggressive behaviours and function in the public sphere, while requiring that females adopt adaptive and nurturing behaviours and function in the private sphere of the family” (Saez et al., 2009:117). Alternatively, there is also “caballerismo referring to nurturance, family centeredness, and chivalrousness” (Arciniega et al., 2008:20)

“We are trying to make changes [in the dairy sector], and since they [gender relations] are social relationships, they are learned. I am one of the warriors. The sexist association [relationship] is fatal. In Nicaragua there is movement with men and women, there are apertures [new access] and a baseline [on gender equality activities]. We have given workshops on how men can involve their wives and daughters in decision making. Because it is important to include the family in decisions. How can you have the initial exercises? The focus needs to be constant. How do we do this in practice?” (Lewis, 2014c, male executive, dairy sector, translated from Spanish).

My overall sense was of a well-articulated awareness, and general understanding of the benefits, of gender equality among these men in different levels of access to power and influence. All of them were in some type of leadership position and thus able to implement activities and recruitment practices to encourage women to participate. The soil had been tilled in some areas more than others according to the Dairy Chamber of Commerce, which provided me with a research report focusing on two rural communities (Flores et al., 2011). This report documented challenges to introducing gender equality into the dairy sector:

“Agro-ecological conditions have changed in the course of time for the development of cattle ranching, an activity that has emerged as one of the pillars of economic development of the territory. This activity is handled mainly by men, although gradually some [female] producers also have a presence, it is continuing with an androcentric perspective on livestock, which makes them face a hostile and exclusionary socio-economic context” (Flores et al., 2011:9, translated from Spanish).

My observations of, and conversations with, the Agricultural Network staff and hosts, along with this foundational research report on gender in the dairy

and livestock sector, all indicated a rich opportunity for the inclusion of gender in the Agricultural Network monitoring and evaluation logic model.

7.5.1 Worldwide Monitoring and Evaluation of the Agricultural Network Programme: 2008–2013

In preparation for a meeting with Global’s evaluation team in Washington, and then in Nicaragua, I reviewed seven publicly available monitoring and evaluation documents on the Agricultural Network programme from the previous funding cycle, 2008-2013⁴⁹. I was looking for the results and recommendations on gender focused efforts. Five reports were prepared by monitoring and evaluation professionals, or by U.S. government offices, on the worldwide Agricultural Network programme. Two were done by University of the North, specifically reporting on Global’s programmes in the Caribbean Basin.

Summarising the worldwide analysis, the USAID 2007 mid-term report (Singer et al., 2007:1) stated that it “was not meant to be an evaluation of the programme” but to “provide guidance for designing and drafting the next Request for Assistance solicitation for the Agricultural Network programme” and to “identify best practices and problem areas so that the programme can make mid-course corrections” (Singer et al., 2007:1). The second document was a USAID Annual Report (2011a:1) which “summarizes the experience and progress with implementation”, with both reports referring only broadly to gender. The first challenge noted in both reports was the difficulty in securing female volunteers to “ensure results oriented integration of gender issues into programme activities, particularly with regard to removing constraints and opportunities for men and women” (Singer et al., 2007:60-66). The second area of comments presented disaggregated participation head counts by gender,

⁴⁹ Although summative evaluation reports from the previous Agricultural Network cycle were available online, the original Request for Applications (RFA) was not. Without this document I was unable to determine if gender equality was explicitly mentioned as a “critical requirement”, as it was in the 2013-18 RFA.

reporting the number of “beneficiaries” served by volunteers (U. S. Agency for International Development, 2011a:3-4). Neither document mentioned the words ‘equality’ or ‘equity’ in any significant way. When gender was reported only participation data by gender was listed. This insubstantial approach to data analyses is at the heart of critiques from global North and South feminists and organisations working on gender equality, arguing that homogeneity in reporting data reinforces women’s oppression by ignoring their differences and multiple identities (class, ethnicity, marital status, race, sexuality, disability, faith, age, etc.)

Interestingly the USAID Annual Report did include several “success stories” of women-centric projects, such as women in entrepreneurship and leadership roles. The data, however, was not disaggregated beyond participation rates (e.g. how many women entrepreneurs were in leadership positions) (U. S. Agency for International Development, 2011a:35-65). Decades of research (Boserup, 1970; March et al., 1999; Warren, 2007), as discussed in Chapter Four, on using gender analysis methods clearly state that participation rates are an inadequate indicator of changes in gender equality. There are dozens of other indicators currently being used in development, such as economic participation, leadership roles, educational attainment, control of economic resources, property ownership, etc., that could also have been beneficial. (U. S. Agency for International Development, 2012a; de la O Campos et al., 2016).

The last two documents (Weidemann Associates & Joslyn, 2013; U.S. Government Accountability Office, 2015) that I reviewed on Agricultural Network used a worldwide lens. These documents reported on small sub-grants, awarded beyond the core Agricultural Network funding, to “target the confluence of three cross-cutting issues high on USAID’s priority list: natural resources management, gender roles and equity, and integrated pest management” (Weidemann Associates & Joslyn, 2013:4, 19). The small grants were seemingly more successful than the regular Agricultural Network funding

in reaching and providing services to women farmers offering skill building in marketing, farming and leadership. These documents, however, framed this funding as 'supplementary' and focused on pilot programming, which suggests they were of secondary emphasis for the country programmes.

The most recent report on Agricultural Network is the 2015 report to the U.S. Congressional Committees reviewing "(1) how USAID administers the programme, (2) how partners implement volunteer assignments and screen volunteers, and (3) the extent to which USAID uses monitoring and evaluation to manage the programme" (U.S. Government Accountability Office, 2015:1). Again, the lack of emphasis on any gender related topic is striking. The Government Accountability Office's primary recommendations focus on better screening of volunteers against terrorist and other watch lists and improving background checks. The GAO cites the need for an improved information management system for the monitoring of negative reviews on volunteers and for the monitoring of a volunteer's accomplishments based on the agreed upon scope of work (U.S. Government Accountability Office, 2015).

7.5.2 Country Level Monitoring and Evaluation of the Agricultural Network Programme: 2008–2013

Moving from the worldwide scope to the country level analysis, I located two monitoring and evaluation reports, 2011 and 2013, evaluating country level activities which included Nicaragua. The 2011 one was a mid-term report which noted:

"A few projects involve more women producers than others, likely due to partnerships with organisations that have a clear strategy for promoting gender equity. None of the [Agricultural Network] country programmes have a written strategy or system for measuring how specific projects might impact men and women differently...All countries expressed an interest in receiving support in assessing gender equality relevant to each project area. Recommendation: Recruit volunteers to facilitate local-level gender analyses with staff, partners and hosts for all projects

and develop a strategy for enhancing and measuring positive gender impacts” (Zaleski, 2011:vii).

“The main participants in Nicaragua’s dairy project so far have been adult men. There are currently only three female dairy hosts. Twenty two percent (9 out of 41) dairy sector volunteers have been female. Often it is the male heads of households and their sons who participate in knowledge and skill building activities...In-country staff reported no written strategy to involve women in programme activities or promote economic and social empowerment and equity. However, staff seemed to recognize the need for more strategic thinking around this. They said they have been encouraged by [Global] DC staff, as well as volunteers, to think about how to involve more women” (Zaleski, 2011:18).

This is the first Agricultural Network report that I found to critically reflect on the need for a more gender based analysis, and the first country programmes to include it as an area of interest. The final report for the 2008-2013 funding cycle for Global reported numbers of female volunteers and a list of many projects that were working with women, some with success:

“The men are in charge of making decisions on what to do with money because they are making the money. In this case we are changing their minds because the women are making the money - Agricultural Network In-Country Staff, Nicaragua” (Global Development (Pseudonym), 2013b:37).

“My perception and assumption is that the activity of asking poor women their opinion was very significant. It appears that was new to them, that their opinion had never really been asked as seriously in the context of that work”
Agricultural Network Volunteer, Dominican Republic”
(Global Development (Pseudonym), 2013b:37).

7.6 Monitoring and Evaluation Week in Nicaragua June 23–27, 2014

At the end of Phase Two of my research, a week-long monitoring and evaluation meeting was held at the Nicaraguan Agricultural Network office with all four staff⁵⁰, a two-member monitoring and evaluation team from the University of the North in the U.S. and myself. It should be noted that the monitoring and evaluation meeting began with a considerable amount of cultural and professional awkwardness as the newly arrived consultants and I tried to determine why the agenda had changed drastically over the weekend. The meeting agenda for the monitoring and evaluation week had been finalised by the Friday before the start, with input and agreement from the three stakeholder groups on what the activities for the coming week would entail. There was a sense of urgency in the monitoring and evaluation team and Global, who wanted a completed logic model draft with measurable indicators to be developed by Nicaraguan Agricultural Network. This was to be as a model for the rest of Global's country programmes.

The foundational document we used to inform the creation of the logic model was Nicaraguan Agricultural Network's *Country Project Strategy: Livestock and Dairy* document⁵¹. It had been collaboratively created by Global, Nicaraguan Agricultural Network and the monitoring and evaluation team. With the expansion of the livestock and dairy sectors as an overarching objective, the purpose of the University of the North's visit was to clarify the Nicaraguan Agricultural Network's strategy for the next five years. All hoped to do this by developing a monitoring and evaluation plan with project and gender specific indicators:

⁵⁰ A new Programme Officer had been hired two weeks previously. There were now the Country Director, two Programme Officers and administrative support.

⁵¹ This is a Global internal document, no citation available.

“The overall objective of the Nicaragua Livestock and Dairy Project is to facilitate access to domestic and international value-added beef and dairy markets, thereby stimulating sector productivity and competitiveness, and generating opportunities for small and medium-size producers to improve their incomes and standards of living” (Global Development (Pseudonym), 2014b:1).

As can be noted, the objective is gender neutral. As clarified for me by the Agricultural Network and University of the North staff the gender indicators would be designed collaboratively as part of the coming week’s discussions. I helped facilitate two of the gender conversations and participated in those. The final meeting occurred when I had already left Nicaragua. What became evident was that there were a diverse understandings on what constituted gender equality, how it related to feminism and to the Agriculture Network programme. The Country Director was interested in documenting efforts in progress reports to Global. The Programme Officers’ concern was their accountability around implementation of gender equitable activities. How gender equality was included in a programme: “only adding more women” (Nicaragua Agricultural Network Staff Member #2, 2014)? It was through these formal and informal conversations with the staff that I began to understand that discomfort on the subject was not only based on country’s historical experience with externally funded programmes, which excluded men during the 1970s and 1980s. It became apparent that discomfort was also based on their life experiences in their homes as children with tension and violence in their lives. Tension and violence increased between the adults who were living through the political instability of the country during the Samosa, Sandinista and Contra conflicts. Additionally, this discomfort was based on repercussions resulting from the reduction of social services brought on by the demands of the structural adjustment programmes (discussed earlier in Section 4.4).

Unfortunately, for my research, this logic model planning meeting was when the preliminary gender indicators were selected and I was not present. At the

first two meetings which I attended, the University of the North evaluation team and I clarified for the Nicaraguan Agricultural Network staff that the inclusion of gender indicators was entirely optional (as specified by Global). There would not be adverse consequences if they felt uncomfortable moving forward.

For a gender initiative to be even remotely effective, the people responsible for implementation have to feel it is a valuable activity; otherwise the results will be less than ideal, even counterproductive. Introducing new cultural norms into a society can often be met with resistance or rejection, requiring a diplomatic and sensitive approach in acculturating the activities. For example, when I wanted to host a meeting for a women's cooperative, although it targeted women, I made it clear that it was perfectly acceptable for men to come and participate. The group was responsible for identifying its own membership.

Once the subject of gender was broached, the Nicaraguan staff began, over the following week, to relay their experiences, as a country and as individuals, with gender and feminism. Prior to working on the gender indicators to insert into their settled strategies, a monitoring and evaluation team member and I delivered a short presentation on the current research about gender and development. This was intended to create common understanding of terms and language used by their own Nicaraguan National Human Development Plan (National Frente Sandanista de Liberacion, 2012) and USAID (2013). The USAID milieu, although a Northern one, was important because as the programme funder and through Global, the Nicaraguan Agricultural Network staff was to some extent expected to support gender equality in such a way that it would bridge seamlessly into the overall agricultural mission.

The comment made by the Country Director was summative of the current status of gender equality as an intentional strategy in the Nicaraguan Agricultural Network:

“It’s never been a priority within our country strategies, but we are not opposed to including it. We just want to make sure we can measure it [the activities and outcomes]. Every day it’s more confusing, I wish someone would tell me [what gender means]” (Nicaragua Agricultural Network Staff Member #1, 2014, monitoring and evaluation meeting).

In a subsequent comment by the Country Director, it was apparent that there was a need for more conversations about different scenarios where women could work outside the home, if they chose, and still have a positive educational impact on their children:

“When a woman goes out to work in the free zone, they pay her less than men. What she takes home at the end of the day may help feed her family, but as far as education for her and her children, she loses much more. While she is at work, she has to pay someone to take care of the kids. Usually it is someone from a lower class who is less educated, which results in a greater loss [for the children]” (Nicaragua Agricultural Network Staff Member #1, 2014, monitoring and evaluation meeting).

Gradually, those of us from outside Nicaragua were familiarised with the local historical context on gender by the Nicaraguan Agricultural Network staff. The following conversations ensued:

“How do we include gender if we don’t know about what it means?” and “The leader of Agricultural Network [in Washington] is a woman and they have three female Programme Officers, and we have two Country Programme Officers that are women, so we are already doing gender. Why do we need to complicate it [by including it in our indicators]?” (Nicaragua Agricultural Network Staff Member #2, 2014).

“The word gender has been demonized and has a negative connotation in Nicaragua. Personally, I don’t like to use the word ‘gender’. In Nicaragua, when you say ‘gender’ it

means zero men, but to the extreme. It's something I don't agree with. I don't like it because it is also violence, if gender is about having the same role as men and being violent like men used to do, I don't want to do it. Usually it is the men who provide the money and women stay at home with the kids. I am a single mother, I have money, I drive, but I don't agree that men are bad. When you talk about gender, you link it to feminism, which was extremist and anti-men. For example: if you were not a lesbian, you were the enemy. They caused a lot of violence by this. We have had an opportunity to work with larger NGOs and are working with farmers, and see how loaded the term is" (Nicaragua Agricultural Network Staff Member #2, 2014).

"Beginning 8-10 years ago, our country introduced the concept of gender through development work [with external international funding], but it only focused on women. Many organisations formed to represent women, but they are extremists [for they exclude men]. For me, gender is equal opportunity for women, men, youth. When someone mentions gender, I immediately reflect on the extremists' perspectives of gender. Their gender is about leadership skills of women, so that they can come out on top, have the opportunity to express my ideas. But in this organisation [Global] and gender, I can say I am a woman who has voice and makes decisions. I don't know how I would differentiate this in the work that we do; I feel that I already have it in my environment" (Nicaragua Agricultural Network Staff Member #3, 2014, monitoring and evaluation meeting).

"Now we have laws that support women. Now I don't need a man to get a loan or buy a car. Our country has made progress, but the changes haven't come under the pretext of gender, but human rights" (Nicaragua Agricultural Network Staff Member #3, 2014, monitoring and evaluation meeting).

The contextualising of gender equality as a human right was a useful reframing for me, yet still raised some concerns. A human-rights approach to gender mainstreaming is embraced by the United Nations:

“Gender mainstreaming and a human rights-based approach to development have much in common. Both rely on an analytical framework that can be applied to all development activities (for the former, the different situation experienced and roles played by men and women in a given society; and for the latter, a normative framework based on entitlements and obligations). Both call attention to the impact of activities on the welfare of specific groups, as well as to the importance of empowerment and participation in decision-making. Both apply to all stages of activity (design, implementation, monitoring and evaluation) and to all types of action (legislation, policies and programmes). Finally, both require the systematic adoption of new and different approaches to existing activities, as distinct from developing new and additional activities” (UN Practitioners' Portal on Human-Rights Based Approaches to Programming, 2016).

Some of the Feminist critiques were quite different:

“Feminist critiques of the international human rights system in the early 1990s argued that it had effectively become a structure to protect men's rights. Scholars argued that both the substance of human rights norms and the institutions devised to protect them were skewed to give preference to the lives of men. Non-government organizations also documented the inadequacies of the human rights canon with respect to women. The response to calls for gender mainstreaming in the U.N. human rights system has been muted” (Charlesworth, 2005:11).

The challenge I find using human rights as the leverage for gender equality is that it does not necessarily address the inequality caused by power differentials, particularly in a patriarchal culture such as Nicaragua. One could receive equal pay and still not have equal voice in decision-making in the private or public spheres of women's lives. Ultimately gender equality can only be achieved if women and girls, men and boys, have equal rights and opportunities which means their needs, interests and priorities are equally valued, supported and recognised in their distinct cultures and governments. To achieve gender equity

however, equal opportunities in the form of gender equality, social justice *and* human rights need to exist (Patel, 2012). Reflecting back on the 2006 Nicaraguan law passed in the last decade, which bans *all* abortions regardless of the health of the mother, focusing solely on human rights is not enough to protect women's right to choose (Kampwirth, 2008).

I did, however, see that a human rights lens to gender equality could be a foundational conversation with the Programme Officers. I regret that these in-depth conversations took place during my last week in Nicaragua, limiting discussion on topics that are better held informally and personally. According to Sepulveda, Carmona and Donald (2014):

“A human rights approach is comprehensive and progressive, because it explicitly envisages all women as agents with inherent dignity and entitlements to a range of rights – rather than just as mothers, as workers, or engines for greater productivity or efficiency. Human rights law provides concrete tools that individuals and organisations can use to hold States (and to a certain extent, non-State actors) accountable for actions or inactions that exacerbate or perpetuate the unequal distribution and lack of support and recognition of unpaid care work. Policymakers can be challenged using different national, regional, and international mechanisms that exist to monitor compliance with women's rights” (Sepúlveda Carmona & Donald, 2014:445).

One of the monitoring and evaluation staff was from Cameroon, Africa. She shared her personal discourse about the influence of Western classifications of gender:

“Since I have been in the USA, [I have heard people talking about] equality, equal pay, opportunity, voice. What is gender in an African perspective, and what is it coming from the West? Sometimes that translates badly in different societies. In certain African cultures we believe that women have important roles. I haven't found a space I am

comfortable in between these two worlds [Africa and the West]. Sometimes it is harmful to step into a culture and say ‘this is gender’” (University of the North Extension Staff Member #1, 2014, monitoring and evaluation meeting).

Her reflection was useful for all of us that were from the global North as ‘external’ consultants in the meeting (which represented four out of nine people present). All knowledge is contextually influenced by an individual’s cultural background, societal norms, values, biases and priorities and this knowledge is also temporal. What could be true in that moment for each of us could also change and be influenced. Gender equality is like a prism, it reflects and captures a multitude of truths and realities.

In preparation for, and in anticipation of, these discussions, I excerpted a section out of the Nicaraguan domestic National Human Development Plan (NHDP) 2012-2016 that lists the government’s gender priorities. I hoped to understand current gender politics in Nicaragua and I hoped to situate the dialogue within the Nicaraguan context. As a result, I provided this NHDP excerpt on a handout in both English and Spanish⁵²:

“The challenges of the Government of Reconciliation and National Unity for women, in this new period of government 2012-2016, are:

1) *Leadership and empowerment*:

a) Promote women’s and men’s awareness of citizenship rights, participation and involvement, making visible their participation and contribution level to decision processes in development.

b) Promote the participation and mobilization of women’s political, economic and social roles for integration and full participation in the Complimentary Equity Model of gender practices to validate and legitimize their presence as creative subjects.

c) Strengthen organisational policies and train women to promote an inclusive, participatory and complementary leadership.

⁵² Some of the people at the meeting were monolingual in either Spanish or English.

d) Mobilise more women producers and micro-entrepreneurs, organised for their integration and full participation in municipal decisions.

2) *Promotion of gender equity in leadership positions in political, trade union and community work fields.*

a) Strengthen the process of institutionalization of gender practices to contribute to equal rights and opportunities of women and men in institutions (regional and municipal governments).

b) Expand and strengthen gender units in all branches of government.

c) Strengthen the integration of gender practices in institutional and municipal budgets.

d) Strengthen mixed spaces for awareness and education of values regarding gender, equality and non-discrimination.

e) Promote the access of women to paid employment, dignified and without discrimination.

f) Promote awareness processes, training and education in values that contribute to the family unit and the community to prevent violence.

g) Promote processes of awareness and training in values that contribute to the unity of the family and the community, for the prevention of violence and human trafficking.

h) Promote partnerships between women and men in different sectors, political, religious, economic, social and cultural, to promote equality and complementarity.

i) Promote research strategy that enables knowledge and appreciation of the situation, regarding the economic, political, social and cultural status of women relative to men.

j) Promote a communications strategy that makes visible and recognises women as leaders of the country's development in all areas of society".

(National Frente Sandanista de Liberacion, 2012:93).

As with many policies, however, there is an absence of activities recommended to help achieve these goals. Additionally, there is no indication of governmental funding to support any efforts. The Nicaraguan Agricultural Network staff had shared earlier in the week an example of the Nicaraguan

government passing a law that required primary schools to give children milk. The government did not provide any funding for the milk to be purchased; the goal was not implemented. In contrast, Nicaraguan Agricultural Network's gender equality efforts could be considered already funded through Global, whose whole mission was to provide expertise. Global could send in gender experts who could work in partnership with agricultural experts to weave together and move forward both agendas.

The introduction of the NHDP government document, which most of the Nicaraguan Agricultural Network staff knew about but had not had the chance to review, gave the discussion some locally constructed definitions that they could consider. The monitoring and evaluation staff suggested that the group should first complete the strategies of the whole agricultural programme during the current week. On the final day that the monitoring and evaluation team would be in country, the group could decide how to include indicators specific to gender. This approach made the most sense for creating a logic model, as determining indicators specific to gender can be challenging. Taking processes related to the rationale of a programme which staff have accepted, without much conscious reflection, and turning their understanding into explicit activities and outcomes, is extremely challenging (Renger & Titcomb, 2002).

On the last day of the monitoring and evaluation week, gender specific indicators were created by the team members (see Table 6.3). I regret that I was not present because my air flights had been booked before the additional work day had been added as a result of the agenda having been changed the earlier in the week. I believe I could have contributed critically to the discourse, partly because out of the five external consultants, I had spent the previous four months in partnership with the Agricultural Network staff, one that developed a lot of trust and friendships. I would like to believe that my contribution would have helped facilitate the conversation. In particular, I would have liked for all of us to have brainstormed ideas on specific programmatic ideas on how

to achieve the indicators, since both research had shown and the staff had mentioned they would welcome some capacity development on gender mainstreaming practices. The results of the meeting I missed are included in Table 7.2 and are from the final report submitted by the University of the North monitoring and evaluation team (University of the North Extension (pseudonym), 2014).

Table 7-2 - Nicaraguan Agricultural Network Gender Indicators for 2013-2018

<p>Programme Strategy Consider needs of women in order to increase participation and access:</p> <ul style="list-style-type: none"> • Child care • Location • Time • Communication and marketing • Ensure programme activities do not increase burdens on women
<p>Establish Sex-Disaggregated Targets Programme Output:</p> <ul style="list-style-type: none"> • Instead of: <i>50 farmers trained in GAP</i> Use: <i>50 female and 50 male farmers trained in GAP</i> <p>Programme Outcome:</p> <ul style="list-style-type: none"> • Instead of: <i>Increased income of farmers in Nicaragua</i> Use: <i>Increased income of male and female farmers in Nicaragua</i> • Gender-Specific Outcome: <i>Women have increased access to and control of their own income</i>
<p>Add Gender Indicators to Organisation Development Index Tool For example:</p> <ul style="list-style-type: none"> • Ratio of male/female staff • \geq 50% of management/leadership positions are held by women • Average female salary equal to average male salary • Monitoring mechanism in place to ensure equal pay for equal work • Professional development for all staff on gender • Human resources recruitment efforts target women • Gender focal point
<p>Increase Participation, Decision-Making, and Leadership (Access and Abilities)</p> <ul style="list-style-type: none"> • Opportunities by women in business matters of the cooperative, using participatory strategies at the three organisational levels of the cooperative: board of directors, cooperative management and staff, and in activities provided to producers

7.7 Organisational and Programme Reflections – One Year Later in 2015

In 2014, using a systemic intervention approach for my research involved an effort to learn about the relationships (professional, causal, power-based), perspectives, social networks, opportunities and challenges that contributed or hindered the inclusion of a gender equality consciousness in a specific international development programme based in Nicaragua. At the time of my field work, my physical presence and inquiries prompted conversations and sparked interest within the NGO staff and other stakeholders about the historical background of gender in their country and their current understanding of how it might be integrated into their work. Now, a year later in 2015, I became curious about what, if any, changes had occurred, or what perspectives might have been altered since my visit. Ideally, I would have undertaken follow-up interviews in person, but doctoral time and financial constraints made this unmanageable. Instead, I opted to conduct informal conversations over the phone with representative stakeholders from Global in Washington, D.C., with the Agricultural Network in Nicaragua and with the lead evaluator from the monitoring and evaluation team from the University of the North. As Burns (2012:88) puts it, I was “not trying to map reality, but to build a picture of the different realities experienced by different stakeholders”. Below are reflections from the three different groups of stakeholders who were involved with my research with Nicaraguan Agricultural Network. All of them had contributed to the gender equality monitoring and evaluation indicators.

Reflections from Global Development, Washington, D.C.:

“There was not a lot of understanding [about the concept of gender equality in Nicaragua], but a lot of resistance and defensiveness. The non-profits that came in during the 1980s from the outside focused on empowering women, but did not work with the men. There was an increase in physical

violence and the women were retaliating against men. The biggest difference I saw [after our work on gender equality] was they [the staff] talked more about gender equality. The conversation that was had with staff was an important one. It opened their eyes to how they could contribute [to gender equality in the programme]. At the international meeting in Guatemala, they [the Nicaragua staff] were the most vocal. They adapted the USAID reporting tools to represent women and developed more activities.

“When I went to the Dominican Republic [after our meetings in Nicaragua], I brought up gender equality. They thought it was important too and gave some examples of wanting to work with female farmers, yet they did not include it in their indicators. The indicators need to be developed by country on a case by case basis. We [Global] thought it was valuable, but weren’t going to require the countries to report on them” (Global Development (Pseudonym) Staff #1, 2015, no longer employed with NGO).

“They [Nicaraguan Agricultural Network Staff] seem to be more aware of women’s engagement. I wish we had done a pre and post survey [about the staff’s perceptions of gender]. I noticed an [increase] in frequency of times when the topic of gender came up. Any new activity or project, women are now being considered” (Global Development (Pseudonym) Staff #2, 2015).

The two Global employees both mentioned that they had perceived an increase in awareness and articulation about gender by the Nicaraguan staff. Because there are no monitoring and evaluation processes at the NGO level to quantitatively or qualitatively capture impact, their responses cannot be empirically documented, or used to improve the imbalance. Dating back to my first volunteer project with Global, I have observed that Global has an organisational malaise in instituting a systemic approach to gender mainstreaming, regardless of funding mandates.

The reflections from the University of the North’s monitoring and evaluation team member were much less hopeful. The member of staff felt that the approach from the national office was very hands-off, with no clear

direction on issues of gender. She said that the priorities for indicators remain the value chains and changes in gross national product. There was a sense of disappointment that there had not been more follow-up from the week of gender equality discussions. Nevertheless, she reported that the Guatemalan Agricultural Network team⁵³ had specifically looked to work with female hosts. Additionally, the team is documenting the current number of women in leadership, and is providing gender equality training for staff (University of the North Extension Staff Member #1, 2015).

From the next level down in the organisational hierarchy, the reflections from two Nicaraguan Agricultural Network Programme Officers denoted their personal perceptions had indeed changed:

“We are clearer on the conceptual level and it [the gender focus] strengthened our technical knowledge too. We are clearer on how to apply it practically. We can’t require the hosts to have more women [participating], but we can help with the expectation to make the activities have more flexible schedules and easier for them [women] to participate. We cannot change the reality of the country, or of the livestock farmers, but we can at least make things more accessible to women. Our strategic part is to provide the tools so that they can be economically active. They feel that their production is contributing by making a financial contribution to their community. We must consistently address this issue. There is much need. Gender is not to exclude men, but to be more inclusive of everyone. In terms of indicators [what we learned from the gender efforts], is supporting us greatly in this new strategy [of supporting female entrepreneurial cooperatives]” (Nicaragua Agricultural Network Programme Officer #1, 2015).

⁵³ I participated in the week-long orientation of the new Guatemala Country Director -while he was in Nicaragua in 2014. Discussion about gender equality was a frequent topic, especially since Guatemala has a large number of indigenous communities. He mentioned his interest in having me offer some FST workshops once he got his staff hired. This -still may happen, post-PhD.

I personally did not know how to identify the application or lack of gender in a project. Now I know that gender has to do with taking into account the needs and possibilities of a group (the most vulnerable, usually young people, women and older) to set dates and times of workshops, budget and strategies. Also it takes into account the type of needs, not only of a company or cooperative, but also of its employees.

Now I apply, or at least try. Currently, I am building a business with a partner and 100% of the staff is women, 90% with young children. Wages are paid according to performance and according to the statutes of law. We try to take into account issues that encourage them and then we respond. For my part I am thankful for some of the teachings with which I was unfamiliar. Also, it taught me that you as a woman have the same rights, duties and obligations as everyone else and we have to take our place and defend our rights” (Nicaragua Agricultural Network Programme Officer #2, 2015).

Additionally, a Nicaraguan Agricultural Network staff sent me an article published in August 2014 in the *National Cattleman Nicaragua* newsletter:

“...in a strategic alliance with the Nicaraguan Agricultural Network, the value of women as key actors is promoted in the sustainability of the Nicaraguan livestock production. The field day held on Tuesday, August 12 prepared more than 300 producers, of which 70 were women, participated in the [sponsored capacity development] programme. [The women] were consulted about major experiences in their farms, which are the most suitable time for them to attend training and what were the main topics of interest.

“Nicaraguan Agricultural Network’s Programme Officer highlighted the important role that rural women play in livestock production. Additionally, she emphasized that [the programme] has a great interest replicating the use of empowerment strategies and technical tools, allowing for more important economic, social and environmental decision making roles by women” (Information Unit of the National Livestock Commission of Nicaragua, 2014).

This article represented to me a new level of understanding and commitment by the Nicaraguan Agricultural Network to actively support and promote gender focused events in their activities. Although women represented only 23% of the total participants attending the 'field day', this event demonstrates the programme staff's pledge to be more gender sensitive. This event is particularly gratifying, considering they were tackling a male-centric agricultural sector of livestock and dairy production. Another optimistic note is the statement, as quoted, of the Network's Programme Officer who articulated well the benefits of including women in these types of events.

From a systemic intervention, these reflective quotations and the newspaper article signify shifts in the understanding by the country office and its staff of how to incorporate gender equality into their thinking and programmes. Further, it shows an increase in comfort level by the country office and its staff in publicly sponsoring and participating in an event that had a gender component. There is a dichotomy in the Programme Officer's statement (above) from my follow-up telephone interview. On the one hand, she does not feel that she has the ability to 'change the reality of the country or livestock owners'. On the other hand, she has an understanding that the issue of gender has to be continuously advanced. It is necessary to endeavour to change the inequality that exists in Nicaragua. Another positive sign is that they remembered to send me a copy of the article to share their achievement, which represents to me a small shift in the ontological paradigm.

From a GAD theory approach, it is appropriate to not impose values from the North, but as Walby (2005) remarks, "gender mainstreaming is constructed, articulated and transformed through discourse that is clustered within frames that are extended and linked *through struggle and argumentation* (338, emphasis added). It was through frequent informal discussions that new light was shed on a subject that had been marginalised in the Agricultural Network as a whole, beyond Nicaragua. Credit goes to the more formal debates during the

monitoring and evaluation, week-long, meeting where terms and experiences were debated that resulted in the Nicaragua office identifying culturally relevant gender terms with which they felt comfortable.

7.8 Chapter Conclusion

Chapter Seven provided a first-hand view of the plurality of roles that can be enacted in a systemic intervention: researcher, intervener, organisation development volunteer/facilitator, diplomat, advocate, friend and feminist. Seeking to support the inclusion of gender equality indicators within an agricultural programme was shaped by the research questions. The primary questions concerned the opportunities and challenges for improvement within a development NGO using Feminist Systems Thinking's theoretical constructs as an intervention strategy to dissipate policy evaporation of gender equality at the country office/programme level.

The opportunities were many, beginning with Global's willingness to sponsor my research and to pilot a longer-term volunteer position for me to focus on gender equality with their programme in Nicaragua (or Guatemala). It is disconcerting, but not surprising, that even when organisations express their interest in gender equitable practices, many NGOs (and corporations and governments) do not have the experience, comfort or training on 'how' to design and implement gender sensitive practices. I want to note also that the country office in Nicaragua took a calculated risk in hosting an American researcher from a British University. These two countries share an historical reputation for silencing marginalised voices and managing social change with a 'top-down' approach (e.g. the American Civil Rights Movement, the British Suffragette Movement). This hierarchical openness to systemic change suggested there might be an opportunity to conduct the GAD recommended approach of any gender initiative, that of a gender analysis (Clancy et al., 2007; de la O Campos et al., 2016). The changes in the end, however, were more subtle and less structural in nature.

There was a shift in tone and understanding by the Network's staff regarding gender equality's role in their culture and on the progress that can be made by using a more gender sensitive lens when designing and implementing programmes. The follow up conversations with both women Programme Officers (one who is still with the organisation and one who has since left) were distinctly different from the previous year. Gone was the defensiveness and resentment of the vestiges of the historical wounds of 'feminism'. This was replaced with a personal ownership and commitment to improving gender equitable practices. The current and historical discourse, and sometimes contentious debate, in Nicaragua on gender equality is an ongoing one. It is currently more comfortably couched in the language of human rights rather than women's rights.

Returning to the discussion about the relationship between critical theory, CST and gender equality discussed in Section 3.3, I saw the staff of Agricultural Network struggle with the difficult topic of gender equality in their work and in their culture. Both the country director and his two female staff members were able to critical reflect on the role of gender equality in economic development, shifting cognitive norms and pushing against the cultural resistance and were willing to include gender responsive indicators in their work.

There was a different message was given in the Washington, D.C. office. Although USAID and Global extol the virtues of gender equality in their programmes, the 'talk' is not substantiated with the 'walk' in terms of staff development, transparency or accountability. Following my return to Hull, I noticed a change in Global's "What We Do" web page. When I first viewed it, prior to my research, there was a section called "Women and Gender". One day a newly redesigned and updated website appeared; "Women and Gender" was gone. Several months have passed since the new website was installed; my hope that 'women' fell off the website accidentally waned. When I asked, during the phone call with the Senior Director, about the change, and if the absence

was a shift in focus for the organisation, people were not even aware that the change had happened. They certainly did not know if the change was permanent. All of the Global and Agricultural Network staff I queried about the web site change were surprised, but most were not alarmed. This contrasted with my initial response, which was disheartened. Was 'women and gender' removed to take the pressure off of Global for its accountability? Was there a belief that gender equality was already woven into all of Global's programmes so there was no need for a 'stand-alone' activity?

It was my sense that USAID's Agricultural Network programme worldwide was systemic in one aspect. If Nicaragua is exemplary, the programmes are united in not prioritizing gender mainstreaming in their activities. This is partly the reason I created pseudonyms for stakeholder groups represented in this research. My work as a systemic intervention researcher is to support individuals and groups to strive for self-identified improvement. The fragile relationship between gender mainstreaming policies designed in the global North for programmes implemented in the global South is actually systemic worldwide.

My comments are not meant to criticize USAID and its efforts, but to demonstrate that the leading agency for development efforts which has launched the Global Development Goals, by which other agencies shape their priorities, is still trying itself to understand how to effectively mainstream gender equality. In a recent, extensive "review of corporate gender equality evaluations in the UN system", published last month by the United Nations Women Independent Evaluation Office, some of their 15 conclusions on steps for improvement and their "way forward" would also benefit the Agricultural Network programme (Segone et al., 2015:2). Some of the UN Women's remarkably self-critical and reflexive report (Segone et al., 2015) and subsequent webinar that could inform USAID's efforts include: the strengthening of gender analysis within corporate and country-level strategic planning processes;

gender mainstreaming capacity development strategies for staff not merely developed, but also fully funded; the strengthening of monitoring and evaluation results down to the programme outcome level; and, a difficult one to implement, conditional funding based on compliance (Segone et al., 2015:32).

The social change that happened is more localised and personal, but that makes it more sustainable. That is not to say that the changes are not systemic, for I would like to make a case that they are. Although it is true that the systemic change was not organisational, the two Programme Officers, Nicaraguan born and raised women, have a better understanding of what contribution they can offer to their country to bring about social change through their influence. The first programme officer, a leader in the Nicaraguan Agricultural Network today, is presently managing and organising several women's SME cooperatives as one of Global's new country strategies, along with the livestock and dairy endeavours. The second programme officer, who left the programme, is opening her own business and is ensuring that women employees are being paid the market rate for their work. The systemic part of their contribution is that they are young, single mothers raising children under the age of 10. They are formidable women leaders and role models in the Nicaraguan culture as well as contributing to the capacity development of other women throughout the country.

The results of the gender mainstreaming efforts during Phase Two, however, need to be interpreted with caution. Granted the conversations about gender equality over the three months were in a nascent stage, however, clear progress was made with the resulting official indicators in Nicaraguan Agricultural Network's monitoring and evaluation reports. As noted in the reflections section, however, although there is greater awareness of and personal connection to gender equality at the individual level, at the organisational level there is much work to be done.

Chapter 8 Phase Three: Feminist Systemic Intervention, Nicaragua

As a reminder, during Phase One I met with Global Development in Washington, D.C. while in Phase Two I worked primarily with the Nicaraguan Agricultural Network on gathering their required data and identified gender equality indicators. In Phase Three of my research, my volunteer role took a subordinate position to my research working with rural communities; Feminist Systems Thinking became more active. As a point of clarification, my two functions and their activities, were at times distinct, yet both informed and shaped my decisions on any given day. They equally contributed to the emergent method that I am going to be calling Gendered Systemic Analysis (GSA) in Chapter Seven.

My choice for selecting the Feminist Systems Thinking framework as the theory to shape my fieldwork was motivated by a statement in Stephens (2012b) doctoral thesis. Stephens wrote: “Feminist Systems Thinking is an ideology critique of selected theory. I also propose that *Feminist Systems Thinking is political as it is grounded in ethical principles that challenge decision-making, power and coercion*”(Stephens, 2012b:16, emphasis added). This bold statement characterised what I wanted to imbue my systemic intervention with, and what would be required of me as a researcher and interventionist. I wanted to encourage stakeholders to apply and later critique Stephens’ framework as a way to challenge the status quo of inequality that might exist in their lives. My efforts were an attempt to go beyond the logical and linear framework thinking that is often used by development programmes presupposing that change occurs as a result of carefully planned and coordinated activities (Burns & Worsley, 2015). By choosing Feminist Systems Thinking as the starting point in my fieldwork, I set an intention that I was interested in facilitating and supporting stakeholders to challenge ‘what is’ in order to create ‘what should be’ (see Ulrich, 1983, for a deeper analysis of the importance of contrasting the ‘is’ and the ‘ought’).

Due to literacy considerations, and to reduce confusion with too many release forms, these same participants were verbally introduced to my research and signed a roster to indicate their participation. To clarify, these participants in rural communities were part of a larger community intervention being offered and managed by the National Agrarian University (UNA - Universidad Nacional Agraria). Participation in the study was voluntary; participants could withdraw at any time without giving a reason. Part of the consent information explained that the meetings and workshops were to be electronically recorded to assure accuracy and facilitate data transcription. All recordings were kept confidential. It was also explained that any actual quotations used in my thesis and journal publications would be anonymous. Recorded data was stored on a password-protected computer.

8.1 Chapter Structure

Chapter Eight concludes the discussion of my fieldwork and has eleven sections. Section 8.1 describes the chapter structure and content areas. Section 8.2 reviews my interventionist role in this part of my research, followed by 8.3 describing my 'observer trip' with UNA University as part of their teaching team. Section 8.4 underscores the epistemological and ontological norms inherent in capacity development, suggesting that the wisdom needed to strengthen Feminist Systems Thinking for a Nicaraguan context should be obtained from the perspectives of the groups with whom I worked. Section 8.5 is the heart of this chapter, where the Feminist Systems Thinking (Stephens et al., 2010a; 2010b; 2012a; 2012b; 2013a) model begins to change from a theoretical framework to an applied method (my own contribution). Section 8.6 introduces an emergent Gendered Systemic Analysis model resulting from the knowledge gained from the workshops in rural Nicaragua. Section 8.7 describes the method that was created as a result of the workshops. Section 8.8 and 8.9 summarize reflections from workshop participants, the UNA Director and a UNA student. Section 8.10 summarizes the methodological learnings that

occurred during phase three. Finally, 8.11 summarises Chapter Eight and leads us to Chapter Nine, the conclusion of the thesis.

8.2 Interventionist Role and Power Differentials

In calling myself an interventionist, I am of two minds about the impact of the role. Initially, because I came in as a 'researcher' and 'Global expert volunteer' I had in effect created a power imbalance. However, as my relationships built and trust increased, the power imbalance was reduced by my explicitly owning an intervention role and therefore I became accountable for it. Failing to own it can lead to abusive action without even realising it. According to Volkov (2011:27), "roles are also a translation of professional values, priorities and principles into behaviours and courses of action to deliver desired results". As noted in Chapter Five, White and Taket (1995:1088) expressed their concern about the lack of perceived importance given to the role of the intervener by the systems research community.

Referring back to my research question, the purpose of the series of workshops was to see how Feminist Systems Thinking could unfold when participants used the principles as an analytical tool rather than as a theoretical framework. First, I needed to translate the principles into local Spanish and look for cultural misalignments. This verification process meant I was now in an 'expert' role, reinforcing power differentials by 'holding the knowledge' separate from the stakeholders. Because workshops were all going to be one-offs, my fear was that participants would not have enough time to process the new content and this could cause frustration or confusion, with participants being left with unanswered questions. I also had another concern, as I am rarely sure of the literacy level in any given group in a developing country ahead of time, so *how* I imparted knowledge was a significant consideration; my approach had to work for both literate and non-literate participants. My strategies for ensuring cultural and linguistic appropriateness might include the use of story, visual, and hands-on methodologies, rather than relying primarily

on the written word. My repertoire of tools and approaches incorporates different learning styles (i.e., to address auditory, visual and kinaesthetic learners) and domains (i.e., cognitive, affective and physical), and is therefore designed to engage most audiences (Pritchard, 2014).

As I mentioned in Chapter One, I attribute the objective of making improvement in the name of social change to both systemic intervention and Feminist Systems Thinking (Midgley, 2000; Stephens, 2013a). Having said this, I also know that my prioritisation of action in the form of social change was a social construct I imposed in the workshops. My reasoning for a social change emphasis is twofold. First, the geographical remoteness of the participants and transportation constraints reduced their access to workshops that might be more readily available in larger communities. Therefore, bringing innovative, unusual and interactive methods for analysing their businesses, such as Feminist Systems Thinking, would be excitingly fresh. Second, and more significant, most of the technical support these small communities and organisations receive is from ‘outside experts’, whether outside their rural community (such as the UNA team) or from volunteers from more affluent countries. When the experts leave, they often take with them the theoretical processes of how to reflect critically on the new knowledge. Consequently, it was important to offer capacity development that was not merely a ‘knowledge transfer’ but a co-creation of new knowledge using systems thinking, which allows for emergent and critical thinking. As Morgan has stated:

“Systems thinking also leads to a reconsideration of most of the current capacity tools and assessment frameworks now in use. Results-based management and other output centred approaches may not fit the complex process needs of capacity development... suggestive evidence that conventional conceptions of capacity and capacity development miss much of the dynamics and interactions that result in increased capacity to achieve results, perform, and cope with complex change” (Morgan, 1997:9-10).

Passing Feminist Systems Thinking knowledge to the workshop participants, and encouraging them to revise, adapt, discard or debate any elements of the content or activities, gave them new knowledge and power to shape their businesses as they thought appropriate. I used my presentational skills to introduce *a* (rather than 'the') definition of Feminist Systems Thinking, and then released the expert reins and saw what reflective knowledge would surface.

As I have already determined, the exciting and equally frightening spirit of systemic interventions are their organic evolution. As you peel back each new layer of understanding about an identified problem or opportunity for improvement (not everything in an intervention is problematic), a stakeholder group, a programme, an organisation or a culture, you may find the intervention shifts in a completely new direction. Or, as happened with my work, you discover a new footpath on the same gender equality journey.

Having identified that the Nicaraguan Agricultural Network country strategy would not provide my access to rural families, the Programme Officer introduced me to the National Agrarian University (UNA- *Universidad Nacional Agraria*). Under the auspices of their Research, Extension and Postgraduate Department (DIEP - *Dirección de Investigación, Extensión y Posgrado*)⁵⁴, a nascent⁵⁵ business development project that was due to be launched in two rural and remote communities in Southern Nicaragua (San Carlos and Boca de Sábaló) and I was invited to join their teaching team. Consequently, I conducted six Feminist Systems Thinking workshops: four with UNA stakeholders and two with the Nicaraguan Agricultural Network's dairy cooperatives. The Feminist Systems Thinking framework morphed and adapted after each workshop in

⁵⁴ DIEP is responsible for the articulation of academic research into practical experiences and training programmes to ensure the development of academic, innovative, entrepreneurial and business skills in students and academics as well as professionals, technicians, producers, entrepreneurs in the agricultural sectors (Universidad Nacional Agraria, 2015).

⁵⁵ Project was launching the week following my arrival in Nicaragua in March 2014.

response to participants' input and feedback along with the teaching team's reflections.

8.3 My Observer Role with the National Agrarian University

My initial introduction to the National Agrarian University⁵⁶ (*UNA-Universidad Nacional Agraria*) occurred during my first week in Nicaragua at a meeting with the Director of Research, Extension and Postgraduate Department (DIEP), who was also a senior lecturer. The principal purpose for the visit was to re-engage their existing partnership between Nicaraguan Agricultural Network and the University to initiate more collaborative projects.

The discussion with the Director of DIEP focused on two areas: the current community development project led by UNA and my research. The Director explained that she and a team of UNA faculty, tutors and Masters' students were due to launch a new capacity development project in two rural communities working with 20 family-run, micro and small businesses. The research goal of the project was to "identify agribusiness and/or local agroecotourism companies" (Lewis, 2014b).

⁵⁶ As background, UNA is one of four public universities with two campuses, one in Managua, Nicaragua's capital city, and a second smaller satellite in a rural agricultural community, Camoapa, two hours by car. UNA has a student population of 3,800 student in five different agricultural faculties (e.g. Animal Science, Rural Development) offering 11 degrees (e.g. Engineering in Renewable Natural Resources, Business Management Degree in with a Major in Agribusiness) (Universidad Nacional Agraria, 2015)

The Director of DIEP explained that the participants in the capacity development project had already been recruited and agreed to attend monthly trainings and complete homework assignments over the next six months. The training sessions were held at local community centres to allow for easy attendance. The businesses selected were all family-owned and operated, and the families were keenly anticipating the project and felt a sense of pride at having been invited to participate. The project focused on organisational sustainability, with the required attendance of a two-member family team and, if possible, the second person should be a young person. This expectation was an innovation to fortify the family business and increase economic stability, while also creating a new social norm for cross-training family members irrespective of their gender roles.

An outcome of this initial meeting with UNA resulted in an invitation by the Director of DIEP for me to join their project team for the next two months⁵⁷.

Concurrently, the Director of DIEP and I agreed that my research topic of



Figure 8-1 - UNA Teaching team

Feminist Systems Thinking and its change management ethos, combined with participatory activities, fitted nicely (in a thematic sense) into their curriculum (described below). Serendipitously, the launching of the project began in two days with a large team (13 people) (See Figure 8.1⁵⁸ above) of faculty, tutors, and students travelling to two rural communities in southeastern Nicaragua. I would join the group as an observer, with no role as an intervener *per se*, to

⁵⁷ I was only going to be in the country for two months of the project.

⁵⁸ All of the photographs were taken by me. I asked permission to use them in my research prior to taking the pictures.

observe their work, look for opportunities of alignment between Feminist Systems Thinking and their curriculum, gather ideas on how to design my workshop to meet the participant needs and serve as a member of the support team.

Day one of the observation trip began at three in the morning in Managua (See Figure 8.2, Letter A, below) with a mini-bus picking up team members⁵⁹ along the route. Some of the team lived in a rural community and walked an hour to meet us at 4 A.M. on the motorway.

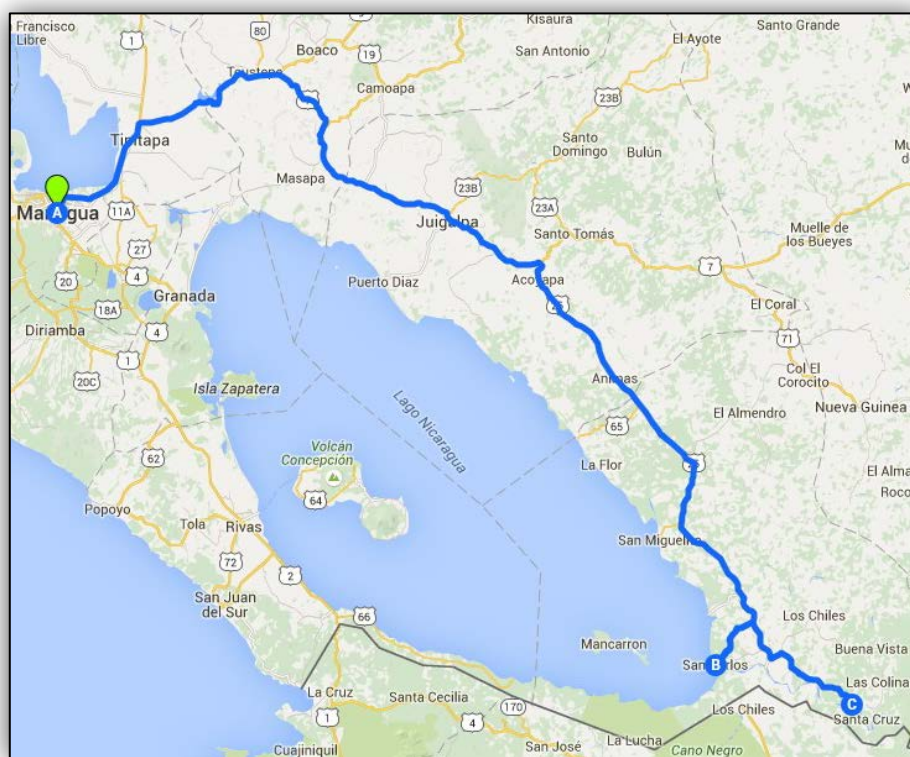


Figure 8-2 - Locations of UNA's Workshops
Managua (A), San Carlos (B), Boca de Sábalo (C)

The level of commitment and good will exhibited by the team (regardless of the circumstances) was a cultural trait I would see unfailingly during my time in Nicaragua.

When we arrived five hours later, the introductory workshop session had 20 participants representing artisans, a bakery, a juice maker, livestock farmers,

⁵⁹ The team consisted of four UNA faculty (e.g. Director, veterinarian), three tutors, five students, a driver and me.

cocoa farmers, and eco-tourism businesses. The workshops in San Carlos (See Figure 8.2, Letter B, above) and Boca de Sábalo (See Figure 8.2, Letter C, above) had identical workshop agendas and facilitators, in different communities. The workshop was dynamic and co-taught by UNA faculty members and students, who introduced a curriculum that would serve as a theme for the entire project. The mission statement of the project, was to “contribute to the sustainability and competitiveness of small and productive ideas in agro-tourism, agribusiness and services in the municipalities of San Carlos and El Castillo” (Universidad Nacional Agraria, 2015). Reflecting on the project mission, I saw the potential of my workshop content to support and emphasise their overall efforts. The introduction of systems thinking, using gender, nature, marginalisation and social change as diagnostic lenses, is not a typical business improvement tool.

As the agenda for the day was being introduced, I was interested to learn that the methodology and accompanying resources being used were designed and provided by a Japanese technical assistant programme in Nicaragua. The Japanese term “*jiritsu*” (or “self-reliance” or “autonomy”) was the central theme for the day’s launch of the programme. The two sub-themes, or “components”, were “awareness and motivation” by “raising awareness of the roles and responsibilities of the ‘I’ and the ‘Community I’ in promoting competitive SMEs” (Lewis, 2014b). As the training evolved, I was left wondering whether the philosophies were too basic or paternalistic. The curriculum was designed by a non-Latin, ‘developed’ Northern country with a distinct societal culture⁶⁰, very different from the Nicaraguan one. Paternalism is a well-known social construct in Nicaragua (and most of Latin America for that matter), with most people attributing its enduring dominance to its colonial historical roots, with punishing European invaders creating a culture of dependence and

⁶⁰ For one perspective see Namiki’s (2015) Online account of one Japanese volunteer’s perspective of his time in Nicaragua.

authoritarian leadership (Lancaster, 1994; Sternberg, 2000). My rhetorical question was, does the use of an 'external' culture's business norms presented by Nicaraguan academics to rural communities perpetuate a paternalist pattern? If this holds true, what about my content derived from Australian (albeit based on case studies including work with an Indigenous Australian community), British and American sources? As Nicholls-Nixon et al (2011) question:

“...what is the relevance of core management concepts such as empowerment, high-performance work teams, and transformational leadership? In such environments, do these concepts take on different meanings or exist in different forms, or should management researchers be exploring new concepts that better describe or explain how work gets done in successful Latin American firms?” (Nicholls-Nixon et al., 2011).

Continuing with the San Carlos workshop, a quotation was written by the UNA team on flip chart paper and displayed on the wall:

“Rural development does not happen in government institutions, or parliament, or producer organisations, or agricultural banks, but in households, on farms and rural communities, from attitude changes that start in the minds of families” (Lewis, 2014b, San Carlos Workshop 31 March 2014).

This was read to the group at the start of the workshop as a way of introducing the content for the day and to recognise the power of families that push against the power structures in which they are embedded. The message had two potential interpretations. On the one hand, it felt like an invitation to the families to express their opinions, because they mattered. On the other hand, it seemed to imply that the families had bad attitudes that needed to change. As the agenda progressed it was evident that participation was a

central focus and the facilitators were skilled at ensuring that ‘all voices got into the room’. The discussions touched on the relationship between self-esteem and personal commitment and whether these personal qualities could be useful at home. There were reflective prompts, such as “what does a person look like with good self-esteem?” and “what does a business look like with self-esteem?” and “in harmony with ourselves?” and “how would your community be if it had good self-esteem?” (Lewis, 2014b)



Figure 8-3 - Reading a Fable

“Motivation and Organisation Methodologies”, as this workshop was called, was intended to increase awareness about the families’ roles and responsibilities within their own lives and their communities. It was suggested that by embracing these motivational ideas, their SMEs could become more competitive and be able to incorporate business ideas that were sustainable.

Before transitioning to the second day’s workshop in Boca de Sábalo, I wanted to revisit my ‘membership’ process with the UNA team. In order to earn my peer membership status and not remain an outside expert, I would need to actively and gently shift their perceptions of me. This



Figure 8-4 - Researcher and Participants

was not a new process for me, for I regularly spend the first few days on any project building trust and establishing collaborative norms for partnerships. A benefit of not having any assigned duties on the two-day observation trip was that it left me in a position to offer assistance by making coffee for the workshop break, hanging flip chart papers and other support.

Every so often, an event occurs where, from that moment forward, I am 'all in' as a friend and peer. That pivotal moment on the observation trip was at the end of this first day's workshop, when we were going to our lodging for the night.



Figure 8-5 - Transportation and Accommodation

As we were getting into the mini-bus, I was told that I would be dropped off at the local lodging and would be picked up in the morning. When I enquired where everyone else was sleeping, the Director of DIEP said they were staying at a former military training centre on the outskirts of town that had no running water, electricity was run by a generator, and it lacked air conditioning and screens. There were, however, plenty of mattresses and everyone had brought their own linen as instructed. In a jovial tone I suggested I was not that easy to get rid of and would prefer to stay with the group. Arriving at the compound, we scouted out the accommodation, mostly looking at it from a

safety perspective, for we were all women of various ages. We decided to drag the mattresses from the individual bedrooms and have a slumber party in the large training hall. It was a rustic and bonding experience.

Day two of the observation trip took us from San Carlos to Boca de Sábalo, two hours' drive on a dirt road. We changed vehicles from the mini-van to a small open truck (See Figure 8.6), to contend with the unmaintained roads. The road dead-ended at the river, and the truck and our team boarded a ferry to reach the other side and continue driving.

It struck me how remote this community was, and I bore in mind how they most likely had very little access to resources from Universities and 'experts', considering the main road to them was bumpy and made of dirt, with a ferry that only went across if there was a vehicle waiting. If pedestrians needed to cross, they had to wait for a car to come, or they have to take the 'people ferry' instead (see Figure 8.14 for photograph).

Upon arrival to the community we were greeted by 15 participants waiting patiently in a small building. The main industry in this isolated community was primarily connected to growing cocoa and selling it in its raw state to multi-national corporations for export. The workshop in this community went along

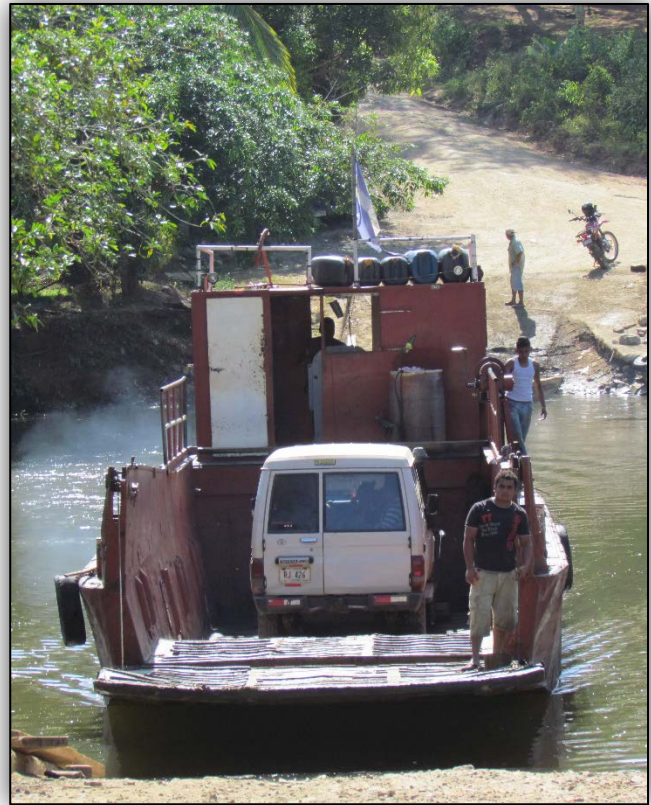


Figure 8-6 - Car Ferry Needed to Reach Boca de Sábalo

the same lines as the previous ones, with fewer people in attendance than anticipated.

8.3.1 Reflections on the UNA Observer Trip

My plurality of roles (Adler & Adler, 1987) was apparent, serving as an observer of the workshop dynamics and as an active-member researcher of the UNA teaching team. The observer role was invaluable in helping me rethink my workshop design. Since my workshop would be in a month with the same groups, I would want to revisit this month's themes (e.g. motivation and organisation) to reinforce and link their learning to the Feminist Systems

Thinking content, which had similar strength-based values. I noticed that many of the middle age and older people did not own reading glasses, yet required them, or had low literacy skills, so decided against providing printed worksheets. I would also



Figure 8-7 - Boca de Sabalo Workshop

increase the font size on flip charts and presentation slides, and include pictures alongside the words. Additionally, I now saw how a cultural activity, similar to a fable reading activity they did, would add an important participatory and relationship-building dimension. I remained concerned that my workshops might also portray a paternalistic demeanour, so I would need to rethink my current design to be less of a facilitator of knowledge and more a co-creator of ideas. I did feel reassured that the Feminist Systems Thinking workshops were going to be of interest and of use to the communities for they were all at different stages of building their SMEs and trying to identify ways to improve their efforts.

I discerned from the UNA workshops that their facilitators *tried* to step away from the conventional view of capacity-development, going beyond the 'training' modality. I could see the UNA team understood the relationship between social learning, empowerment and economic growth. By focusing on their self-esteem and responsibilities as business owners, the participants might trust their own untapped decision-making skills (McBride et al., 2006). UNA fostered communication, humour, reflections, empowerment, safety, and partnership between family members and the team. Yet I wondered about their approach to capacity development, with the transfer of knowledge being primarily one-way. The UNA team selected a presentation style which 'controlled' the content in a way that allowed for little opportunity to challenge what the group was being presented with (Eade, 2007). To be fair, I do not know if the participants had been asked for input to the design of what to include in the six month project, but the first workshop was seemingly predetermined by the Japanese methodology. My hope for the next month was that I would be able to shift this presentational mode.

8.4 People Support What They Construct

An aim for my research was to transfer, to the extent possible, my real or perceived 'expert' role to the participants creating an ethos of change management. I hoped our collaborative work in the Feminist Systems Thinking workshops would be an opportunity to have a reciprocal transfer of knowledge on how best to adapt the framework so that it had local meaning and impact. This desire was shaped by two principles that I hold as essential components of my research and consulting practice. The first ideal, based on my professional and personal experiences, is a belief that change processes requires people to adapt, sometimes comfortably, sometimes with resistance. Yet, regardless of someone's comfort with change, as they engage with the process, I frequently find that "people support what they help to construct" (Weisbord, 1978). Another way to think about this adage is that human beings become more

vested in organisational or societal transformations when they have the opportunity to authentically engage in, support or oppose the change process.

My second principle, more of a conviction, has been written about more eloquently and persuasively by authors such as Freire (1970), Illich (1971), Chambers (1997), Harding (2004) and Hartch (2015). These researchers suggest, among other ideas, that knowledge is socially situated. In any society, those people living within it are the most qualified to identify problem areas and potential action for improvement (Freire, 1970; Chambers, 1997; Harding, 2004). My two principles of inclusion and participatory practices also are reflective of critical systems thinking and systemic interventions.

This approach of wanting to engage people in a conversation about social change, that *they* deemed necessary or a priority, was supported by the critical reflexivity of a systemic intervention. The precise definition or set of methods or activities of a systemic intervention remains elusive. Midgley's (2000; 2014) work suggests a change agent must be thoughtful about what change needs or wants to be done and who should be a part of that critical defining process. Even though Midgley concedes that the term "intervention" has its detractors (Anderson & Goolishian, 1992; Reason, 1996; Chambers, 2005) he advocates, as I do, the use of participatory practices (e.g. co-operative research, peer research) designed and run by participants for participants. The role of an external agent, although still active by posing questions, is to clarify concepts and contextualise information (Midgley, 2000).

8.5 Feminist Systems Thinking Framework Evolves

Phase Three of my intervention, I was lucky to partner with a diverse group of co-facilitators (described in this section). The team of Feminist Systems Thinking facilitators found the Feminist Systems Thinking framework engaging and supportive in creating safe dialogues for the SMEs improvement opportunities. Over a period of two and half months, my colleagues and I

facilitated six Feminist Systems Thinking workshops (See Table 8.1) in Nicaragua.

Table 8-1 - Feminist Systems Thinking Workshops and Stakeholders

Map Legend	Location	Date	Stakeholder Group	Strategic Partner	Number of Participants
A	Camoapa, UNA Campus	24 April 2014	Agricultural Master Students	UNA	10
B	Managua, UNA Campus	12 May 2014	Train-the-Trainer Students	UNA	5
C	San Carlos Community	2 June 2014	Micro and Small Businesses	UNA	10
D	Boca de Sábalo Community	3 June 2014	Micro and Small Businesses	UNA	23
E	El Truinfo	4 June 2014	Dairy Cooperative	Nicaraguan Agricultural Network	5
F	Rivas	6 June 2014	Dairy Cooperative	Nicaraguan Agricultural Network	13
Total Participants					66

What became clear during the first workshop, was that Feminist Systems Thinking framework alone, was not sufficiently descriptive or able to be interpreted intuitively by the people with who I was working. I do not think it was because the frameworks too complex of a concept, I think it was more that the participants were not used to looking at the intersection of gender, nature and marginalisation. Whatever the reasons, it was clear that participants quickly became stuck on where to begin to use the framework for analysis. Granted, Stephens specifically opted to leave the five ethical principles of Feminist Systems Thinking (i.e. gender, nature, marginalised voices, social change and pluralist method/ologies) without a methodology or methods, suggesting, “Adopting a feminist systems perspective may help practitioners look for places where unintended consequences of an intervention might

unfold...the principles follow no particular order...neither might all principles be relevant to, or present in, a project” (Stephens, 2013a:8-9).

The remainder of this chapter documents how Stephens’ framework evolved during six workshops into an applied method while keeping its ethical, feminist, and systemic principles. To describe this development I have chosen to imbed the actual workshop design I used in the workshops. The overall learning objectives and content for each workshop remained the same; what did change was the process and activities in response to the participants’ recursive feedback, implicit and explicit.

An important disclosure should be made here. Throughout the workshops, I never used the term ‘Feminist’ Systems Thinking. During my first meeting with UNA, they recommended that I drop the term completely and only use ‘systems thinking’. By now, this was a frequent discussion between me and my Nicaraguan colleagues both within the Network and the University. I inquired whether the term gender would also be problematic, but they were sure it would not be. Essentially, ‘feminism’ was perceived to marginalise men, while ‘gender’ was seen more neutrally where both sexes are included.

8.5.1 Workshop Description

As described in Chapter Seven, during the first few months in Nicaragua I spent a lot of time on road trips interviewing hosts and gathering baseline data. I took advantage of these frequent and long trips with Agricultural Network’s Programme officer (who was doing the driving) to discuss my workshop design and asking for suggestions and clarifications. The Programme Officer who had an innate way of visualising an activity, even if she had never participated in similar experience, was extremely helpful. Simultaneously, I was building my systems and gender vocabulary in Spanish, which were weak.

In the meantime, UNA requested a simple description of my workshop and I provided the one below (Table 8.2) (translated from Spanish).

Table 8-2 - Systems Thinking Workshop Announcement

Workshop Title	How to strengthen your business with Systems Thinking
Brief Description	This training will introduce a new way of thinking about your business using systems thinking. This participatory event will give you new tools to adapt to any situation to support family, community, or business efforts. Participants will be introduced to an overview of systems thinking and a collection of tools. Participants will explore and apply the tools during the workshop activities.
Workshop facilitator	Native Spanish speaker and doctoral student from the University of Hull in England. Ellen is an organisational development consultant with 25 years of experience supporting communities, families, women and men.
Specific Learning	At the end of this workshop you will: <ul style="list-style-type: none"> • Know the how to use each tool and how to use them in different situations, business projects. • Create simple action plans to support your businesses / projects using systems thinking.
Who should attend?	This workshop is suitable for women and men who work with UNA/ Agricultural Network and are interested in learning a new system thinking method which can support them in business management efforts.
Dates	Various

Upon reflection, the workshop announcement in Table 8.2 could have been much simpler. I sensed when I asked participants if they knew what type of workshop they were participating in, there was a silent pause signifying the announcement was not clear. The details I included in this announcement did not adequately represent the practical application of the workshop in such a way that participants could see the see the potential benefits of thinking systemically.

8.5.2 Workshop Purpose and Objectives

Sometimes, when an external ‘expert’ is brought in to conduct a capacity development, the community can feel anxious or concerned on two common accounts. The first is they want their community to be viewed in the best light and members often go to extra lengths to welcome us. The second worry I have detected from my development projects, is a recurrent concern by many about the potential complexity of content. Moreover, for those with low literacy skills, they worry they will be asked to read or write something in order to participate.

To ameliorate the tension, it is my practice upon arrival to walk around, shake hands individually and introduce myself. In Spanish speaking countries in particular, this immediately puts everyone (including myself) at ease, for they recognise I am a native Spanish speaker and therefore a '*vecina*' (a neighbour). If there are any activities that require reading or writing I have learned to make those into group activities. Most of the communities I work with are small and rural and therefore they know amongst themselves who can read and write and they self-sort into groups with at least one literate person.

Another approach I use in relationship building is to include visual cultural artefacts to explain a topic (e.g. strategic planning, business planning). For



Figure 8-8 - Systems Thinking: Strengthening our Efforts

example, with my opening/title slide (Figure 8.9) I used a photograph I took during the observation trip of the 'people ferry'. Once everyone was settled and the workshop began and using a

conversational tone, I introduced myself and the teaching team and then referred to the above slide. The image depicts two modes of transportation to cross *El Rio San Juan* (San Juan River)⁶¹, one primarily for vehicles and the other only for people⁶². To set a friendly tone in the workshop I begin with a provocative question, anecdote, or current event like the above image and then

⁶¹ Rio San Juan runs along the borders between Nicaragua and Costa Rica to the south running 119 miles to the east into the Caribbean Sea (Wikipedia, 2015c)

⁶² The five women in the boat are my colleagues from UNA.

ask a series of open-ended questions: “We are looking at a system you are familiar with; what type of system is it (e.g. transportation)? What are some of the individual parts of the system (e.g. people, ferry paddler, boat, and water)? Are there other systems, seen or unseen that might impact our people ferry (e.g. red ferry on left, water rising and falling, other boats on the river)? What if you took one person out of the boat all of a sudden, what might happen (e.g. ferry would rock, everyone could lose their balance)? What impact would it have on the transportation system if one person jumped in the water? Why would intervening into part of the system have an impact (e.g. they are interrelated)?

We would spend 10 minutes considering all the components of the systems, how they were interrelated and what other systems might impact them. This short introduction to systems thinking created an easy and fun participatory activity that put the participants as the knowledge owners with me the knowledge seeker. I would usually ask at least one question that I would use as a model question of two people, “Do you agree with that answer? Why or Why not? So why is it that we are all looking at the same image, yet we have different positions on what could harm or improve the system (e.g. different perspectives, needs priorities). Who is right then? Who is wrong?”

Once we had processed the opening slide sufficiently, I continued to the next slide, the introduction of the workshop’s objectives and goals (Table 8.3).

Table 8-3 - Workshop Purpose and Objectives

<p>Workshop Purpose: Micro and small businesses owners are introduced to (Feminist) Systems Thinking (ST) and are able to apply the concepts to their own enterprises for improvement through the analysis of the roles of gender, nature, marginalised voices, variety of methodologies/methods for problem and the facilitation of social change.</p> <p>Workshop Objectives:</p> <ul style="list-style-type: none"> • Introduce (Feminist) Systems Thinking as a means to strengthen micro and small enterprises. • Practice identification of specific business strengths and weaknesses through the use of (F)ST.
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- Use of (F)ST tools as a means to inspire action (change)
- Engage a broad cadre of stakeholders in implementation planning and decision making utilizing ST.

As part of this objectives slide I wanted to continue to build my “cultural humility (respect and self-awareness)”(United Nations Educational Scientific and Cultural Organization, 2013:24) as a researcher explaining I was hoping to learn from them local wisdom on how to improve a specific form of systems thinking for a Nicaraguan context. To create a social contract with them, in one of my opening slides I asked the participants if they would be willing to join me in a ‘personal commitment’ to help create a Nicaragua relevant model. The presentation slide read: ‘Our roles today are to contribute equally as curious learners and brave teachers’. I went on to explain that the Feminist Systems Thinking model was created in Australia with a broad group of stakeholders, but this was its first trip to Central America. My intent was to have their support to culturally adapt the framework and turn it into a practical tool they could use in their everyday lives. There were no right or wrong question or answers, we just needed to work together to contextualise the framework.

As noted earlier, I heeded the caution given to me and refrained from using the ‘F’ (feminism) word. There were two additional reasons I did not put a particular emphasis on gender equality in the workshops. The first one is based on Stephens’ proposal that the Feminist Systems Thinking framework was “non-hierarchical”, so no principle had a higher priority than the others (Stephens, 2013a:43). As well, Stephens advised, “A gender sensitive research approach acknowledges the importance of contextualising the research practice outcomes in relation to the social, cultural, racial, religious, ethnic, economic and historical situation of the women participants and the recipients of the research” (Stephens, 2013a:45). What did these three ideas (e.g. removing the word feminism from my vernacular, non-hierarchical principles and

contextualising the research) mean to me? It was that I needed to respect ‘what was present’ in the patriarchal norms, even if I did not agree. My intent was to not force change, but to create a critical dialogue about the current status quo and note what, if any, changes were of interest.

Table 8-4 - Workshop Agenda Overview and Working Agreements

Agenda Item and Objective	Process Details
Welcome - agenda review <i>Provide summary of day's activities</i>	<ul style="list-style-type: none"> • Welcome participants, a brief overview is provided of the day • Review research striving to support self-identified opportunities by participants for improvement and change ensuring the tool is culturally relevant and has local impact. • You as participants have knowledge that is important and relevant to this research and beyond • We all have equal roles in team learning, teaching and the research and beyond • Link and build on themes from the previous workshop (self-esteem, commitment, motivation and organisation)
Working Agreements <i>Determine group behavioural expectations</i>	<ul style="list-style-type: none"> • Collaborative working agreements <ul style="list-style-type: none"> ✓ Help me to help facilitate this workshop ✓ Lots to cover, short amount of time ✓ Keep the group focused and on task

To close this section of the workshop, I introduced the ‘working agreements’ with the groups. I had noticed during my observation trip with UNA and in other Agricultural Networks meetings I had attended, that the norm was that mobile phones were not put on mute and participants and staff answered *any* call, at any time. The workshop content often got thrown off course with the distraction caused by the phone conversation and the group would lose focus. In an attempt to mitigate that in our workshops, I suggested that we collaboratively list agreements that everyone could live with, establishing a structure for behaviour and learning etiquettes as a way to show a shared commitment to everyone having a chance to participate equally. Workshop agreements or group norms, are a way of establishing a social contract between

individuals which highlights what how the *group* want to work together effectively to accomplish their goals.

Upon reflection, I was cognisant of my power position during the first third of the workshop with me conveying knowledge to the group. Equally, I was aware and respectful of the power that the participants held. This was their culture and they were the best experts to determine if the content I was presenting was useful or not. In the future, I would like to reduce the amount of time in this first section and find ways to increase participatory activities and practices.

8.5.3 Working as a System: Ice Breaker

In most workshops I have participated in, there is a practice to participate in some type of 'ice breaker' that creates a sense of camaraderie amongst

Agenda Item and Objective	Process Details
<p>Ice Breaker Activity <i>Set a tone of interactive fun and learning.</i> <i>Include all the voices in the room</i></p>	<p>Instructions (divide into groups of 4-6 people)</p> <p>Round 1 (10 Minutes)</p> <p>(Activity objective: thinking systemically, build organisation capacity, decision-making, problem-solving, teamwork)</p> <p>Scenario #1: One member has broken their leg severely and there are no cars available.</p> <ul style="list-style-type: none"> • The team needs to get the injured person to the clinic which is a block away- their task is to figure out how transport the patient to the clinic, a block away. • You do not have any other resources other than your team of 4-6 people • Discuss how to solve this problem using the five (F)ST principles. What principles helped, which did not? • Put your decisions into action! Get that person to the clinic! <p>Round 2 (10 Minutes)</p> <p>Scenario #2: Now the situation is the same only now you now need to get the person to Matagalpa (10 miles away)</p>

participants, is light-hearted, gets people on their feet and does not take very long. While watching the UNA team during the observation trip, I noticed they use of *dinámicas* (dynamics) several times during the day, with which the groups actively participating. The icebreaker I used (Figure 8.5 above) served several purposes. I wanted the group to problem-solve together and think of themselves as a system to solve their dilemma while replicating some of the participant’s real-life challenges.

Table 8-5 - Being a Systems Thinker: Workshop Activity

Agenda Item and Objective	Process Details
Being a systems thinker	<ul style="list-style-type: none"> ▪ What does it mean to be a person who thinks systemically?

Referring back to the activity in Table 8.5 on the previous page, many participants did not own personal transportation and they needed to rely on others or public transportation to travel distances small and great.



Figure 8-9 - Ice Breaker: Working as a System

Ice breakers are also a facilitator's tool to gauge who the extroverts and introverts might be in the group, making me more aware of how I might need to create a 'talking space' for them. This activity offered several problem-solving and instructional component, such as simple problems like a broken leg can be overwhelming if you do not think about the interrelatedness of the problem (e.g. a group carrying a person has to work synchronously, taking turns if travelling a distance, weather). The second learning was practice in boundary analysis of a problem while leveraging your resources effectively.

Later, after the icebreaker, we spoke about the contrast in thinking needed to resolve both problems, a short distance and a longer distance. Prompt questions included: "What did you need to think about differently for this challenge? Was your starting point different from the first exercise in Round One (See Table 8.5)? Did you do anything different from the first exercise? Did everyone participate?" Recurrent in all the workshops where this activity was used⁶³ was the conclusion that participants needed to solve both problems differently, even though on the surface the problem looked the same. A revelation that came from the Rivas Dairy Cooperative (Table 8.1) was the need to work as a team, an element that was a weakness in their work relationships. They had not thought of their team as a system before and this new awareness about their interdependent work encouraged them to revisit how their work teams were currently functioning.

At this point in the workshop the various groups had experienced theorising the individual components of a system and potential internal and external elements that might influence them (e.g. the boat analogy) and also had a practical application of using systems thinking to solve a problem. Up to this point, the activities had been group processes, so the next step was for

⁶³ Once I had co-facilitators (e.g. students), I let them pick the ice-breaker, one they felt comfortable facilitating.

participants to start identifying individual qualities in themselves as systems thinkers.

8.5.4 Being a Systems Thinker

Now that the groups had a general idea about systems, I wanted them to consider that they already had the prerequisite skills to use systems thinking. Adapting Sweeney and Meadows' "ways of a systems thinker" (2010:2) descriptors using simpler terms and in some cases not including others⁶⁴ I introduced the qualities and found corresponding images to strengthen the learning for both visual and auditory learners:

- "Sees whole picture"
 - "Sees oneself as part of the system, not outside the system"
 - Changes perspectives to see leverage points"
 - "Looks for interdependencies"
- (Sweeney & Meadows, 2010:2).



Figure 8-10 - Being a Systems Thinker:
This is a Heap, This is a System

Using a commonly recognised image of a flower made it easy for the groups to see how individual parts can form a whole. The image also portrayed that merely having a 'heap' of individual parts does not mean they all have a role in formulating the requisite system. Therefore part of the decision process in analysing a problem or systems, or a boundary critique process, is deciding which individual parts might fit best for a particular system to be effective.

⁶⁴ I opted to exclude three of Sweeney and Meadow's qualities of a systems thinker because of their complexity in relationship to rural micro and small businesses. Excluded were: "holds the tension of paradox and controversy without trying to resolve it quickly; makes systems visible through causal maps and computer models; seeks out stocks or accumulations and the time delays and inertia they can create (Sweeney & Meadows, 2010:2)

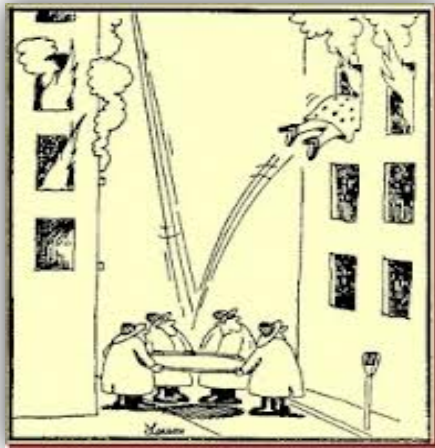


Figure 8-11 - Being a Systems Thinker:
Larson Comic, 2014

(Adapted from, Sweeney & Meadows, 2010:2)

Beyond providing descriptive statements for each of the bullets to the right of the image, I also asked, what could the people in the picture could have done differently. Some of the answers were about communication, planning, team work, leadership, considering the whole situation. These comments indicated to me that participants were starting to adopt and understand systems concepts and terminology.

- “Focuses on structure, not blame
- Holds tension between ‘what is’ and what ‘ought to be’
- Includes multiple perspectives and thinks about the problems and possible actions”

(Adapted from, Sweeney & Meadows, 2010:2).

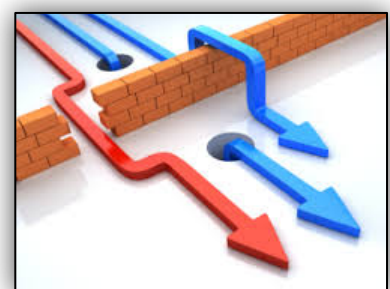


Figure 8-12 - Being a Systems Thinker: Same Problem, Different Solutions

The mention of blame created a lot of discussion in one group who reflected aloud that this quality would be a good one for the community to learn. One

woman indicated that because of their remote location, life could be frustrating when things went wrong with the business, they could not simply replace damaged cocoa pods or broken equipment because of the cost or access to a store. The concept of blame was one that was highlighted particularly with businesses that were family run, with one father remarking he often would blame someone (anyone) when something failed to go right within their juice making business (e.g. not enough containers, labels getting wet).

From my observation, the inclusion of visuals to represent systems thinkers really made a difference in participants' understanding of how to think systemically. In the first two workshops, I had not included the visuals 8.13-8.15, and saw that participants were struggling with connecting the theoretical perspective of using systems thinking and the fact that they were also part of any system they analysed. The introduction of the images during the third workshop in the rural communities enhanced participants' ability to apply systems analysis to their own businesses.

The introduction to being a systems thinker was my way of capacity developing the practice of making choices and decisions that we all have when interacting with our world. I believe the distinction between 'what is' and 'what ought to be' can be a motivating reflection; the mere acknowledgement that what is now, does not necessarily have to stay that way, that there options and alternatives to be explored. According to Amartya Sen (2001), a highly regarded and widely published development economist and social choice theorist, his Capability Approach is the "ability of individuals to have the capacity to choose alternative lifestyles" (Amartya Sen as quoted by Wells, 2015) and also that people have the freedom to "achieve the kind of lives that they have reason to value" (Gammage et al., 2016).

8.5.5 Analysing a System: Horse and Cart

By this point of the workshop, the participants had practised several surface systemic problem-based learning⁶⁵ activities, the people-ferry image and the broken leg role-play. Both of those activities were short, large group experiences introducing different modalities of thinking systemically (theoretically and practically). This next section was designed as a two-tiered activity. Tier one was very surface level analysis just asking the large group to analyse another Nicaraguan transportation system but in more depth. The effort in the first round was to have them become familiar with the horse and cart system before they were asked to look at that exact same image after being introduced to Feminist Systems Thinking principles.

Table 8-6 - Introduction to Systems Thinking Part 1

Agenda Item and Objective	Process Details
Introduction to Systems Thinking (Part 1) <i>To gain experience in conducting a boundary critique.</i>	<ul style="list-style-type: none">• Image of horse and carriage• Brainstorm with the large group to identify all possible components, visible and not visible of transportation system

Horses and carts are prolific in Nicaragua as a standard means of transportation of goods, large and small. During my weeks travelling the country conducting the baseline interviews, I was looking for different cultural artefacts that I might be able to use to illustrate systems thinking. The horse and cart was ideal, for it had a strong gender component (e.g. most carts were driven by men), it had a nature component of a non-human (e.g. horse), and any suggested improvements of the system would have to entail a conversation

⁶⁵ Problem-based learning (PBL) is an approach I used extensively with students and community projects in my previous job. The idea is to make problem-solving a group-centred approach to increase critical thinking skills, team-building and learning using both theory and application process. Successful PBL develops good communication, negotiation and how to build consensus (Awang & Ramly, 2008)

about macro-level social change. Ultimately, the picture I took (with permission) had an ecological component for the men were transporting large tree trunks.



Figure 8-13 - Nicaraguan Horse and Cart Transportation

I posted the picture (See Figure 8.15) and the groups would identify the different systems parts: horse, men, wheels, reins, etc. The reflective questions below were then discussed:

- Is this a system? Why? What type of system is it?
- What are the individual components of this system?
- What are the elements (that you can see) not part of the horse and cart that are potential parts of the system?
- What are the elements (that you cannot see) not part of the horse and cart that are potential parts of the system?
- What would you know if you studied *just* the components?
- Would it be different if you study it as a whole transport system?
- What impact do you have as an observer of the system?
- How do they interrelate?
- What is more useful, to understand the individual components or how they are interrelated?
- If we study this horse and cart will be able to say we know how *all* horse and cart systems work?

This exercise worked well and deepened the conversation about the complexity of systems thinking. The use of a system that was so familiar to the participants made the analysis more profound than something more abstract or

less culturally relevant. The questions created a dialogue amongst the participants and I strategically stepped back from being a focal point of knowledge, with the group taking over the role of asking clarifying questions and challenging ideas for each other. For example, some members felt they *could* understand the whole system by analysing its parts, while others would disagree and say it was not possible.

The analysis of the horse and cart was useful, but I felt that a better introduction to systems thinking would be helpful. My challenge was that my systems thinking and agriculture sector vocabulary in Spanish was deficient, so I turned to the Internet.

8.5.6 Systems Thinking Video

I realised during the first workshop in Camoapa, that I was having a vocabulary issue. Systems thinking vernacular was new to me in English, and endeavouring to learn the appropriate words in Spanish would take time I did not have. On the Internet, I came across a short video of different men, mostly

Table 8-7 - Introduction to Systems Thinking: Part 2
(Metanoia, 2012)

Agenda Item and Objective	Process Details
<i>Introduction to Systems Thinking Part 2</i>	YouTube video on ST in Spanish: http://youtu.be/pOhAyhhI2v0?t=44s Start: 00:44 Stop: 06:37

educators, who described systems thinking very clearly and succinctly. Some the statements were:

“...a person who is a systems thinker wants to understand things more profoundly...to see the whole panorama, the whole map...it is like if you are too close to a painting, you do not see the bigger perspective, you need to back up and also see the wall. You need to go to the root of the problems, and we cannot not understand a systems only by understanding its parts”... (translated, Metanoia, 2012).

“The lenses of systemic thinking allow us to reclaim our intuition about complete systems and improve our ability to understand the parts, see interconnections, ask questions, “What if?” on possible future and be creative about the redesign of the same behaviours”(translated, Metanoia, 2012).

As a way to validate the video’s content as easy to understand and culturally appropriate (it was not made in Nicaragua), I showed it to a group of UNA students during the second workshop, a Train-the-Trainer session of the Feminist Systems Thinking presentation.

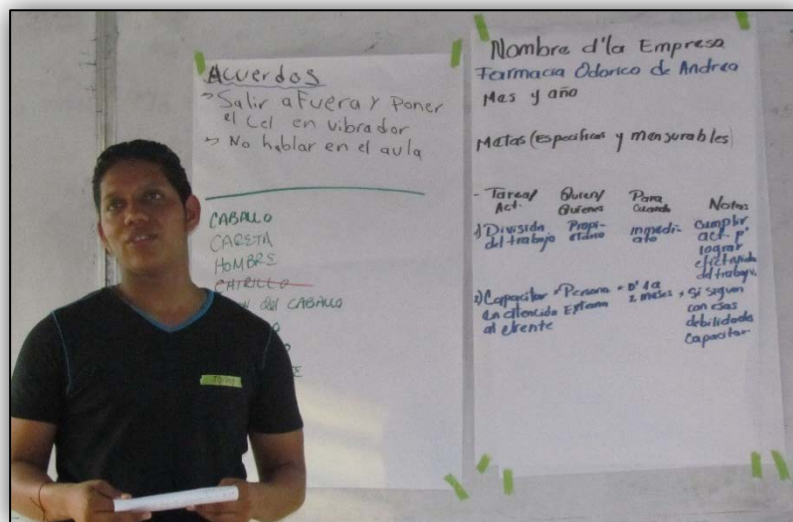


Figure 8-14 - UNA Student Presenting

The students were earning credit to attend the workshop and also were volunteer Feminist Systems Thinking facilitators with other rural communities in which UNA was conducting research. The student group found they understood systems thinking much better after watching the video saying, "...it is much clearer when systems thinking was explained using the video, particularly the interrelation between the parts"..."by the end of the video I understood more about systems thinking"..."I now understand how I am part

of a system” (UNA Students Managua, 2014). Using my facilitator’s outline (Appendix B) the students and I spent time reviewing the activities, timing, my translation and word choices and we made the recommended changes. Many of them were new to facilitation, so we discussed the methodology behind the presentation, how to select appropriate training methods based on individual learning styles, how to design effective learning materials, different strategies for participatory practices, literacy considerations, and content and tips for successful facilitation (e.g. engagement, extroverts, introverts) (Biech, 2009).

Even with the endorsement of the students to include the video in future workshops, I had reservations. One concern was there were no women on the video reinforcing the patriarchal conundrum. A second, more significant unease, was an analogy given by a professor in the video explaining you cannot take two independent parts and assume you can create a new whole: “It is an example that is very sympathetic. A supermodel to walks up to Einstein and says, “Doctor, imagine if we had a child together, your brains and my beauty?” Einstein replied, “Yes, but what if the child has your brains and my beauty?” (Metanoia, 2012). In the end, the students convinced me that the benefit of how systems thinking was presented outweighed the sexist analogy and we could make sure we mentioned the comment’s impropriety prior to showing the film and still benefit from it as a learning opportunity.

8.5.6 Feminist Systems Thinking Principles

Table 8-8 - Introduction of Feminist Systems Thinking
(Stephens, 2013)

<p>Feminist Systems Thinking Introduction</p>	<ul style="list-style-type: none"> ▪ Introduce Feminist Systems Thinking Principles <ul style="list-style-type: none"> ○ Gender Sensitive, ○ Voices from the Margins, ○ Centre nature, ○ Social Change, ○ System Analysis
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<p>Large Group ST analysis <i>Practice analysis of a systems using Feminist Systems Thinking</i></p>	<ul style="list-style-type: none"> ▪ Using the horse and cart as a system, collaboratively identify the components of the systems as they apply the Feminist Systems Thinking model ▪ Write summary for each element ▪ Capture on chart paper.
<p>Large Group Debrief of Activity <i>Share understanding of decisions made (boundary critique)</i></p>	<p>We will discuss the exercise in the context of PS (possible questions)</p> <ul style="list-style-type: none"> ▪ What principle did you consider first? Why? ▪ How many ways were there to solve this problem? ▪ What principles were easy to analyse? ▪ What principles were more difficult to address? Why? ▪ What did you notice about yourselves as 'observers' while analysing the system. What made it easy to understand the system when you are part of it? What was difficult?

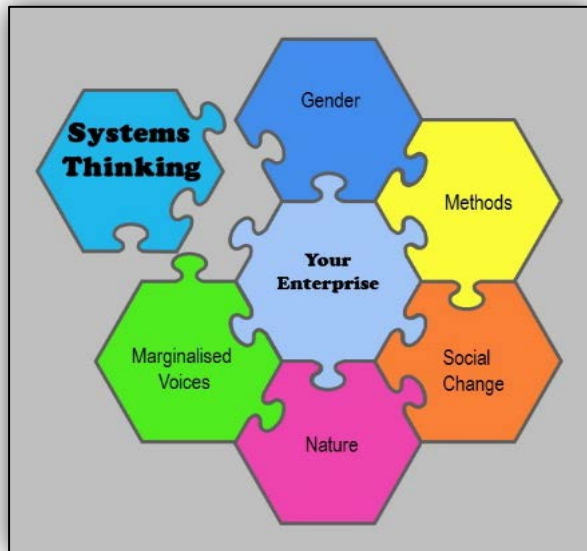


Figure 8-15 - FST as Interrelated parts
(Adapted from Stephens (2013a))

Prior to the first workshop with a group of UNA Masters students at their satellite campus in Camoapa, the Feminist Systems Thinking framework began to evolve. I met with UNA faculty in Managua to review my workshop design and presentation slides. It was also an opportunity to discuss the proposed second workshop, a

Train-the-Trainer for a subset of students that would be participating in the first workshop. The Director of DIEP and I had previously explored training a cadre of her students in Feminist Systems Thinking as a way to build their facilitation and rural development skills. For me it was also a way to situate Feminist Systems Thinking, for the students would ultimately adapt the way in which the framework was taught so it was more culturally relevant and it would deepen their understanding of the knowledge by being Feminist Systems Thinking facilitators. The Camoapa workshop was attended by eight females and two males, students and teachers. After the analysis process of the horse and cart (as described in section 7.5.5 above) I introduced the Feminist Systems Thinking principles for the first time (for me and them). Even though I had practised how I would describe each principle, I grappled with my Spanish terminology and as a result the group struggled with the concepts. We took more time than I had allotted in my facilitation agenda (Appendix B), but I

wanted to make sure we all understood the concepts and I benefited from asking the students to help rephrase any terms that were unclear. I used the metaphor of a puzzle to describe how system 'pieces' are interrelated (Figure 8.17 and 8.18), an image I presumed (rightly or wrongly) that more people would be familiar than the one Stephens (2013a:44) used in her book, which was a honeycomb metaphor. The message I wanted to convey was the changing nature of systems and that there might be many ways to put the 'pieces' together and therefore different ways of relating the Feminist Systems Thinking principles. Not all of the principles needed to be used every time, or in the same manner, but it was worth considering them *all* as part of a starting point for the analysis of a system (boundary critique) looking for prospects for improvement, as a situation dictated (Stephens, 2013a). Paradoxically, the flexibility of the Feminist Systems Thinking framework which represents the pluralist underpinnings of CST, ultimately proved to be constraining and disempowering for most participants in my workshops.

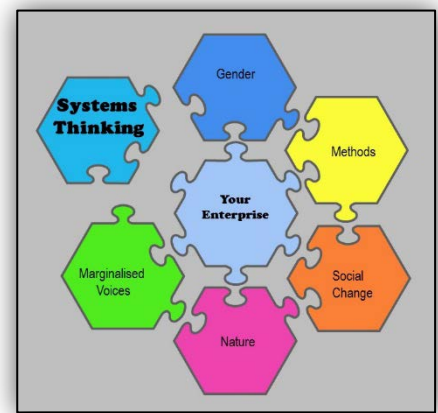


Figure 8-16 - FST Principles as Component Parts (Adapted from Stephens, 2013a)

8.6 Gendered Systemic Analysis Emerges

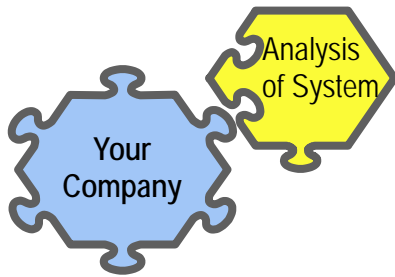
What did become apparent as each group of participants undertook using the principles, was that the non-hierarchical approach as designed by Stephens (2013a) was too vast a beginning boundary. People who did not have backgrounds in facilitation, consultancy, programme planning, or other community engagement expertise needed a more structured approach. As result, the Feminist Systems Thinking framework gradually shifted into a method that I am calling Gendered Systemic Analysis (GSA), which is a reflexive method (yet not linear). A Gendered Systemic Analysis integrates a feminist standpoint, in that a gender analysis is a feminist method approach

derived from Gender and Development theories. The term 'gender' lies beyond the cultural context and stigmatisation (in global North and South) of the term 'feminist' and its emphasis on the political, economic, cultural, personal, and social rights of women. My use of the term 'gendered' aligns with current practice within GAD and gender mainstreaming and analysis research. GSA is not solely focused on women, although they remain a priority, but takes a more holistic analytical perspective looking for the intersections of gender, nature, and voices that may have been marginalised within any prescribed system. GSA also encompasses a systemic approach using boundary critique as a way to identify potential marginalisation of any disregarded entity that is human or non-human.

Going back to Feminist Systems Thinking's foundational work as way to describe how it evolved into GSA, in the remainder of this section, I introduce each Feminist Systems Thinking principle again, this time with comments and changes recommended by the participants to the framework. The sub-section headings have two descriptors, the first line of the header is the name the principle acquired because of participant input or facilitators' observations, and the second line of each header has Stephens' original Feminist Systems Thinking language. Even though the Feminist Systems Thinking framework became a method because of my research, I assert that Stephens' ethical principles remain intact.

Below, each Feminist Systems Thinking principle is introduced using two presentation slides, as they were presented in the Nicaraguan workshops. The first slide provided elements to consider when using the principle and the second slide contained questions for reflection (see below).

8.6.1 Analysis of System (Boundary Critique) (Select appropriate method/ologies, Stephens, 2013a:53–54)



As a reminder, the purpose for my research was to 'test' a new method which would further improve and adapt Stephens' (2013a) Feminist Systems Thinking theoretical framework into a culturally-relevant analysis model that has the

potential to be transferred to other contexts by individuals or organisations. Were there any strengths or weaknesses of its philosophical underpinnings?

Of all of the Feminist Systems Thinking principles, this one, "select appropriate method/ologies" went through the most transformation, moving it squarely out of a theoretical analysis to a practical application. Using Feminist Systems Thinking for the first time and in Spanish, in Nicaragua meant I had a steep learning curve on how to contextualise it without losing its ethical principles derived from eco-feminism and critical systems thinking. As a starting point, at the first workshop I used Stephens' principles, language and theoretical underpinnings to create a baseline of feedback. The two presentation slides contained the following information:

First slide – Method/ologies (examples):

Ideas to consider and appropriate method/ologies based on stakeholders

- Gender
- Age
- Income
- Education
- Literacy
- Health
- Self-esteem
- Schedule
- Commitment
- Motivation
- Access to information
- Previous knowledge/experience
- Perspectives
- Race and ethnicity

Second slide – Method/ologies (reflective questions):

- What method/ologies are used to include different perspectives (decision-making, planning and strategy development, the adoption of best practices) in your company?
- How should it should be?
- What needs to be done?
- Is it a priority?

I knew before I presented this principle that it would be a difficult one to explain and contextualise, partly because I did not think it would be a useful lens for rural business owners to look through. I chose not to alter the principle prior to the first workshop, as I wanted assistance and feedback from the participants to help make any possible changes.

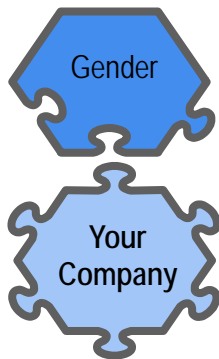
During the second workshop (Train-the-Trainer), which had many of the same students from the first workshop, we were able to clarify their confusion (and mine), “It needs to be a process to identify a problem (e.g. economic, health, etc.)...when we tried to identify the system [and what method/ologies to use] we all had different ideas...using Feminist Systems Thinking adds to a process we know called SWOT⁶⁶, and it makes me think about how can we adapt these [Feminist Systems Thinking] elements to improve the organisation” (UNA Students Managua, 2014). Upon learning that SWOT had been used extensively in rural communities and that analysing a business was a known practice, we changed ‘appropriate methodologies’ to “analysis of the system”, or in actuality, conducting a boundary critique. Once the boundaries of the system were established, our next step was to reflect back on the system using the following three Feminist Systems Thinking lenses: gender, nature and voices from the margins.

⁶⁶ An anagram for a business analytical framework, strengths, weaknesses, opportunities and threats.

8.6.2

Centre Gender

(Be gender sensitive, Stephens, 2013a:44–46)



Having been alerted to the sensitivity to the concept and term 'feminism' I described the 'be gender sensitive' principle as one where women and men have equal access to opportunities and to resources. This principle was not an 'anti-men' approach, I stressed, yet it suggested a sensitivity and awareness for individual women and men's needs, not as homogenous groups, but based on the context or situation. Stephens suggests several practitioner strategies⁶⁷ (e.g. using participatory methodologies to minimise marginalisation, build trust, and engage participants as co-researchers) to create a more equitable intervention. Since the groups I would be working with were not practitioners, however, but small agriculture business owners, I included gender equality awareness examples that would be more suitable.

First slide – Gender (equality examples):

Ideas to consider about gender:

- Men and women are considered to have equal opportunities and access to:
 - "Input to business decisions"
 - "Autonomy in the company"
 - "Ownership of assets"
 - "Purchase, sale or transfer of assets"
 - "Access and decisions on credit"
 - "Control over the use of income"
 - "Leadership"
 - "Representation in business meetings"
 - "Workload and leisure time"

(U. S. Government, 2012:3)

⁶⁷ Stephens adapted some of her suggestions from McNamara (2009)

Second slide – Gender (reflective questions):

- How are gender equitable practices in your companies considered?
- How should it they be?
- Is it a priority?
- Why or why not?
- Who decides if it is a priority?

(Midgley, 1997a; Kabeer & Natali, 2013)

My curiosity on this principle was how it would be received overall by either gender. Below are some reflections and quotations from the various workshops upon reflection of the horse and cart system and in response to reflecting on their own businesses using a gender sensitive awareness. In the analysis of the horse and cart, most people noted that cart-driving is a man's job in Nicaragua because... "the man needs more strength when going into the field, so we do not think the gender should change"(UNA Students Camoapa, 2014) . One woman disagreed saying women could just as easily drive a horse and cart with heavy loads; they would just need to ask for help (from women or men) to load and unload.

Many businesses represented in the six workshops were women-run (e.g. pharmacy, small café, making of cacao (chocolate) candies), and they were comfortable with the arrangement, since "the men had other work to do in the field" (UNA Boca de Sabalo Rural Development Participant, 2014).

The cacao candies group, did, however, identify that "not all women had equal voice in their business, some were too shy or had low self-esteem"(UNA Boca de Sabalo Rural Development Participant, 2014). They did note: "We realized that only women were making the candies, and the task could be done by anyone. We talked about how to get others [men] involved" (UNA Boca de Sabalo Rural Development Participant, 2014). The Feminist Systems Thinking framework helped them see that marginalisation can also occur in a single-gender membership and there were other members of their families that could

contribute, and also to seek input from the less vocal women. The all-women pharmacy also discussed marginalisation: “Decision making is made by the [female] boss, different perspectives aren’t considered” (UNA Students Camoapa, 2014). A group of 20-women recyclers shared, “We each have roles which we share and the work is distrusted similarly” (UNA Boca de Sabalo Rural Development Participant, 2014). The group analysing the family-run café expressed, “Exploring our work load distribution was not a priority, due to financial restraints. There are other areas that need more attention” (UNA Students Camoapa, 2014).

As already noted, I found in the first three workshops, groups got stuck on which principle with which to begin their analysis. The one group that began with gender were clear, “We chose gender first because it can be central to the development of a business especially if their [women’s] voices are marginalised. Some people might not be involved, but they could be affected by the decisions so that needs to be considered” (UNA San Carlos Rural Development Participant, 2014).

This initiated a discussion about why some women might have fewer opportunities: “it is part of the culture”; “men do the heavy work [which gives them a power role], even though both genders can lift heavy loads”; “it would be good to create a better balance within my family business and share the workload” (UNA Boca de Sabalo Rural Development Participant, 2014; UNA San Carlos Rural Development Participant, 2014; UNA Students Camoapa, 2014; UNA Students Managua, 2014).

It was surprising to me that after my experience with Agricultural Network’s two female Programme Officers’ reaction to gender discussions, the conversations in the rural communities were more progressive. The Feminist Systems Thinking conversations began to open dialogues within the families and communities as they reflected on how things were in the present and what could be improved upon moving forward. The men and women both

participated in the discussions, but more often it was the women who saw an opportunity to create a more balanced workload distribution. Some families were realistic in having to include an economic perspective in the workload redistribution, for many of the families lived under the poverty line for Nicaragua, which is why they had been asked to join into UNA's programmes.

Unfortunately, because of the remoteness of the communities, the UNA rural development programme schedule, and my research timeline, only cursory conversations were possible.

8.6.3 Centre Voices from the Margins (Value the voices from the margin, Stephens, 2013a:46–51)



For Stephens (2013a), and as noted in some of the participants' comments in the previous section, being gender sensitive can also highlight voices that have been silenced or ignored based on historical, cultural, economic, racial, religious, ethnicity, ability, education, and other grounds. The conditions for marginalisation of any kind can be present in any relationship, family, community, or country, for it is situational. Someone that may be marginalised in one culture, may not be in another. The imbalance of power is at the heart of marginalisation which sometimes is considered normative in some settings but ultimately undermines a society that embraces equality as a democratic principle (Smith & Brain, 2000). Marginalisation goes beyond human beings says Stephens (2013a), but must also include "non-human" voices. Bringing this level of awareness to "non-human animals are present on the margins and are often active participants in shared and co-constituted value experiences" (2013a:48).

It is these shared experiences that really became highlighted in the workshops. It will be recalled that one of my opening slides in the workshop

was an invitation for everyone to be equally a learner as well as a teacher as we worked with the Feminist Systems Thinking framework. With this caveat, a question was asked if the word 'marginalised' was the appropriate term. Apparently, the word 'marginalised' is most frequently associated with sex workers in Nicaragua and the group suggested that perhaps another term would be more appropriate. The group discussed their preferences of terms and ultimately selected 'vulnerable' as one that would meet their criteria. Another clarifying question from a participant was whether a non-living entity, such as the horse's cart, could be considered vulnerable? From this person's perspective, if only the vulnerability of the horse and man/woman were taken into consideration, than the cart could be in a state of ill-repair which would ultimately impact the transportation system's operation. Both of these suggestions demonstrated the level of critical thought and complex reflection of the participants and extended the scope for what and how humans, cold and warm blooded animals and non-living objects, can all be interrelated and in relationship (in the broadest terms) based on their environment or situation.

The list of potential vulnerable voices expanded with each workshop as new ideas emerged and were selected to be included by participants.

First slide – Vulnerable Voices (examples):

- Ideas to consider about marginalised voices:
 - Gender
 - Youth
 - Pensioners
 - Racial/Ethnic
 - Economic
 - Education levels
 - Mental and physical capacities
 - Foreigners
 - Indigenous people
 - Flora and fauna
 - Objects
 - Others?

Second slide – Vulnerable Voices (reflective questions):

- How are vulnerable voices included in your businesses?
- How should they be?
- Is it a priority?
- What could be the first step?

(Midgley, 1997a; Kabeer & Natali, 2013)

The vulnerable/marginalised voice principle was the most debated and expanded as each group of workshop participants built on the previous ones. These conversations were rich and deep and the ideas from each workshop were brought forward like a baton by the two UNA student facilitators, who would share the conversations from previous workshops. This reframing of previous ideas led to a sparking of philosophies, and allowed for the conversations in the subsequent workshops to have a more critical perspective by not having to start from a singular concept, but one that was an aggregate of knowledge communities in very distinct regions of the country.

When I framed the question, how should vulnerable voices be considered, the blame shifted from the individual, usually poor (e.g. horse and cart owner) to the broader societal issues of poverty and animal abuse. There was a sense that many people would take better care of their horses if they could afford to do so. My prompt was then, what might be possible as a society to drive social change for these animals and families that rely on them? Great ideas surfaced, such as working with the UNA students in veterinarian medicine to set up regular 'horse clinics' on street corners and provide free horse care advice.



8.6.4 Centre Nature (Center nature, Stephens, 2013a:51-53)

Nicaragua having survived dictatorships, wars, natural disasters, and structural adjustment programmes, is yet to fully benefit from its environmental resources. With its

economy depending on agriculture, forestry and fisheries and its considerable rural population, the pressure from climate change is preeminent (Gourdji et al., 2013).

For Stephens, the inclusion of nature as an ethical priority rises from her personal convictions and her use of cultural eco-feminism as one of two bodies of research⁶⁸ in the creation of Feminist Systems Thinking principles. It is the “ontological divide between nature and people” (Stephens, 2013a:51) that is central to ecofeminism’s position and the rationalist artificial constructs between human life and nature that need to be consistently examined giving them both equal consideration in an project, programme or intervention (Stephens, 2015a). In a more recent article, Stephens extends her understanding of ecofeminism from action-oriented to a “New-ecofeminism...deploying an ethos of engagement with those marginalised, silenced, suppressed and repressed, recognise the particularity of human and other than-human co-constituent influences”(Stephens, 2015b:n.p.).

Within the workshop contexts, the principle of centring nature was less difficult to incorporate into a reflective process than I anticipated. The connection between nature and the participant’s daily lives was constant. Whether it was the fishmonger’s concern with the contamination of the lake where he drew his fish or the cocoa grower trying to grow organic products that would bring higher returns at the market. The value of protecting the environment was understood, but sometimes could not be prioritised over the economic factors of poverty.

The Feminist Systems Thinking presentation slides suggested:

First slide – Nature (examples):

Ideas to consider about nature

⁶⁸ The other body of research used in FST is critical systems thinking, and in particular Midgley’s work (Midgley, 2000; Midgley & Ochoa-Arias, 2001; Midgley et al., 2007) of systemic intervention.

- The environment (water, earth, air)
- Animals (large and small, hot and cold-blooded)

Second slide (version 2) – Nature (reflective questions):

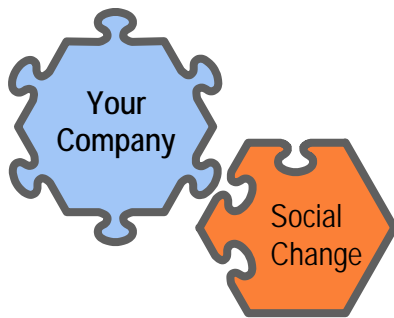
- How are practices of caring for the environment addressed in their businesses? (Animals, land, water)
- What should the practices be?
- How should these practices be done?
- Is it a priority?

In several groups the analysis was that it was good to take the environment into business considerations, but they were less certain on what role they could play to improve practices. At the pharmacy: “[There is] nothing to change...the clients throw the containers on the floor, but that is not our fault”. At the bakery: “solid waste management and management of natural resources are not practised” (Universidad Nacional Agraria, 2014). At the dairy cooperatives the employees acknowledged that water management was a constant concern.

One young man noted that they had choices: “We need to do work that is friendly to the environment and if we mistreat nature, we must replenish it”(UNA San Carlos Rural Development Participant, 2014). There was a sense that as their country become more ‘developed’ that environmental issues would also increase:

“...as with many evolving practices and innovations, like changing from a horse and cart to a microbus, which emits smoke, and contaminates the environment. There are companies that do not think about this, they only consider about their money and not whether they are destroying nature. This is a very important tool [Feminist Systems Thinking] we have learned and hopefully it could be shared in other parts of the country”(UNA San Carlos Rural Development Participant, 2014).

8.6.5 Social Change (Bring about social change, Stephens, 2013a:54–58)



Since the end of the Somoza dictatorship in the late 1970s, many aspects of Nicaraguan culture have gone through seismic social change movements: agrarian reform, women’s rights, labour rights, and the current battle of the proposed Nicaragua Canal.

Yet the challenges for Nicaragua are not dissimilar to social change in the rest of the world, “the obstacles of constructing an alternative, unitary and transformative agenda in the country leave a certain sense of frustration”(Puig, 2015:310).

Social change will continue to happen as countries, communities, groups and individuals respond to the emergent nature of everyday life. From the work that I have done in capacity development in the global North and South, most social change is driven by impassioned people or groups who want things to be different.

As Stephens portrays it, “applying feminist-systems thinking principles works towards achieving *desirable and sustainable social change*” (Stephens, 2013a:54, emphasis original). Although many of the critical reflection examples provided by Stephens for this principle concern are the divide between nature and people, I introduced social change in the workshops as an outcome of the boundary critique process.

First slide – Social Change (examples)

Ideas to consider about social change

- How do you take into consideration nature or what is natural in your businesses?
- What ideas from centring gender, nature and vulnerable voice can you influence to bring social change?

- What would you need to do first?

Second slide – Social Change (reflective questions):

- What social change efforts (gender equality, marginalised voices in honour of nature) are part of your company to make it more desirable and sustainable?
- Is it a priority?
- When is it not a priority?
- Who decides?
- How is it identified as a priority?

Several of the small business identified ideas for improvement and what their next steps were to be for social change. For the family bakery they identified that only 60% of their ingredients were Nicaraguan or 'local' and the remaining 40% were from neighbouring countries. In an effort to reduce their 'carbon footprint' on purchases as well as supporting Nicaragua's industries, they would now look to find new sources for the remaining ingredients. For the agro-tourism farm, they had been trying to have stricter animal husbandry practices so as to not damage the flora and fauna, but were still setting the ground on fire to clear the agricultural fields. They left planning to find other non-detrimental practices to clear their land as a way to protect the iguana⁶⁹ population, which lay their eggs in burrows in the ground.

⁶⁹ Iguanas are docile species of lizards native to Central and South America and the Caribbean.

8.7 Gendered Systemic Analysis Method

As each workshop occurred, the GSA model became more defined. What was a non-hierarchical framework for critical reflection action was now a systemic intervention method. The process of the method is to consider the boundaries of the problem or the system, identifying what is working well and how to replicate those elements and additionally identify what is not working

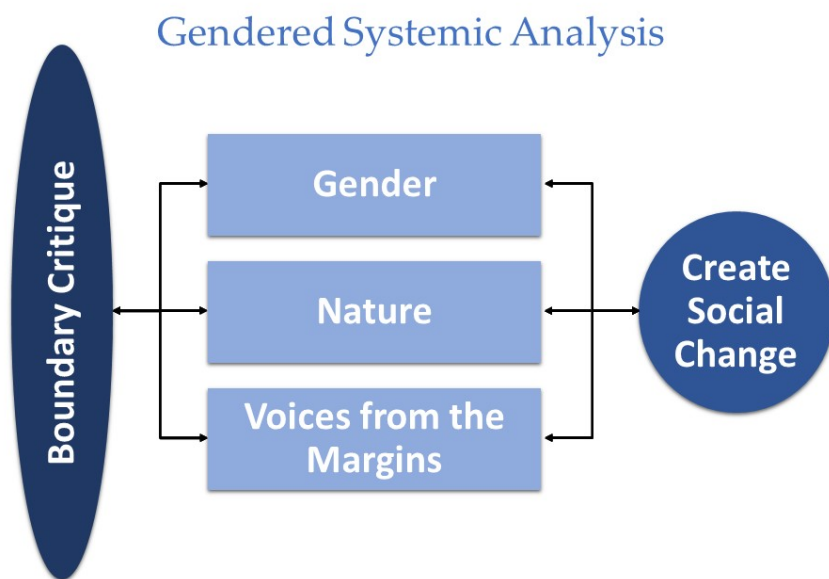


Figure 8-17 – Gendered Systemic Analysis
(Lewis, 2015)

well and needs improvement. Once you have decided on the scope of the analysis, use each of the three ethical principles, gender, nature and voices from the margins to conclude if any of those practices could be improved. Do women and girls have the same access to education, work, and financial resources, etc.? How is nature considered in the business? What are the voices you do not normally include in problem-solving: children, pensioners, others? Once you have identified the areas for improvement, now create an action plan to bring about social change, not just incremental change, but change that creates new positive behavioural and social changes. Below are some examples from the workshops.

One poignant outcome of using the GSA model was from an artisan:

“I have now noticed how very important this element [vulnerable voices] is, I have a very old aunt who lives with me and gives advice about how to run the business [which used to be hers]. But, I ignored her, telling her that no, those ideas are from previous times. But now when I go home, I will try to see what ideas she has to contribute”. (UNA San Carlos Rural Development Participant, 2014)

A fishmonger was also motivated into action. He and others met the boats at the lake side every day, bought and cleaned fish, put them in ice coolers and walked around selling them to local restaurants. At the end of the day, he cleaned his cooler out with chemicals and pours the contaminants into the same lake from which he harvested fish. When I asked what the social change could be, he said, “Well, I am not the only one that does this, we all do” (UNA San Carlos Rural Development Participant, 2014). I asked, “So if you wanted to create sustainable change in those practices you deem harmful, what would be a good first step?” He thought for a minute and said, “hold a meeting with all the fishmongers to discuss what other options/practices we could all put in place” (UNA San Carlos Rural Development Participant, 2014).

By the end of the sixth workshop, the Feminist Systems Thinking’s theoretical framework had gone through a transformation and expanded to include an actionable method to encourage social change. Furthermore, the political call to action as described in Stephens’ work was now more detailed and culturally representative of Nicaraguan sensibilities.

8.8 Workshop Participant Reflections

My original plan was to have participants complete a systemic evaluation form designed by Boyd, et al. (2007), which I had translated to Spanish. However, after using the instrument once, the teaching team and I decided it was too complex in terms of the language used and the phrasing of the questions taking participants’ literacy into account. Instead of having a paper survey, at the end of each workshop we asked questions, like, “Did you find

this process useful? What did you learn? What could we change in the workshop or method to make it better?" Below are some examples of participant feedback:

"I learned how to think of different strategies when looking at a business and to take into consideration different perspectives".(UNA Rivas Dairy Cooperative Participant, 2014)

"I liked the interaction between the parts of the system similar to employees as part of a larger system". (UNA San Carlos Rural Development Participant, 2014)

"Exploring different capacities to analyse helped us see there are weaknesses in the business and identify different entry points for intervention"(UNA San Carlos Rural Development Participant, 2014).

"Many times in some companies or work it is said: this is a job for a man because he is stronger. But the decision should involve us in decisions on how to do the best job possible [regardless of gender]. Balance the work" (UNA San Carlos Rural Development Participant, 2014) .

"We need to work better as a team, 'all for all'. We [as team members] are important for the proper functioning of the business yet we are also resistant to change. We will succeed if we all work together"(UNA Rivas Dairy Cooperative Participant, 2014).

I tried to incorporate an action plan as the final stage of each workshop, but found there was not enough time to introduce the process well:

"The plan of action was complicated, [it], needed more explanation" (UNA Students Managua, 2014).

I also inquired about the suitability of the workshop and method with rural communities:

“The language needs to be more accessible. Depending what group you need to change the language. This can be applied to any system, small business, and families.

“I would need more examples of what systems thinking is”
(UNA Boca de Sabalo Rural Development Participant, 2014).

8.9 Stakeholder Reflections – One Year Later in 2015

A year after my work in Nicaragua, I conducted informal phone interviews with various stakeholder groups: Global and Nicaraguan Agricultural Network staff, UNA Director of DIEP and one of the UNA Student Facilitators. Some of the prompts I used were: What were the challenges/opportunities with gender equality practices in the Agricultural Network programme prior to my research? What changes were you *hoping for* on gender equality practices because of my research in Nicaragua? Hopes for Global as an organisation? What would you consider some of the evidence of changes? Here is some of what they shared:

“We did a series of interviews with the protagonists (participants) and many of them brought up the topic of systems thinking workshop in motivating them to work on their business plans. We plan to train the agricultural specialists (Degrees in Rural Development) in this second phase for them to provide continuing capacity development to the MSMEs on all the themes including systems thinking”
(UNA Director of DIEP, 2015).

“I feel it is a tool that gives you practice in analysing problems not only in work situations, but in personal ones. It is a simple way to analyse what we do as we develop. It permits you to place in each of the dimensions, be it social, economic, political, and assess problems. It allows you do conduct a much more specific analysis of a situation. It is much easier to work with systems thinking than with a draft profile [of the problem]. We noticed that many of the rural business owners [who had attended the workshops]

appropriated systems thinking in their lives. It's really important though, to keep supporting the groups to apply the method" (UNA Master Student Co-Facilitator, 2015).

The impact of the systemic intervention workshops was more than I had anticipated. Considering the workshops were only an afternoon each, I foresaw that the experiences were more in line with capacity building activities (training) and not necessarily a capacity development outcome creating a shift in thinking and ultimately even a shift in the culture. The people I was able to interview above though were involved in the deliverance of the workshop content and so therefore became more familiar with its potential and impact. They also were exposed to all of the workshops and were involved with the facilitation and adaptation of the content. The comments above thought do represent a key principle I noted earlier, people support what they help to create.

8.10 Chapter Conclusion

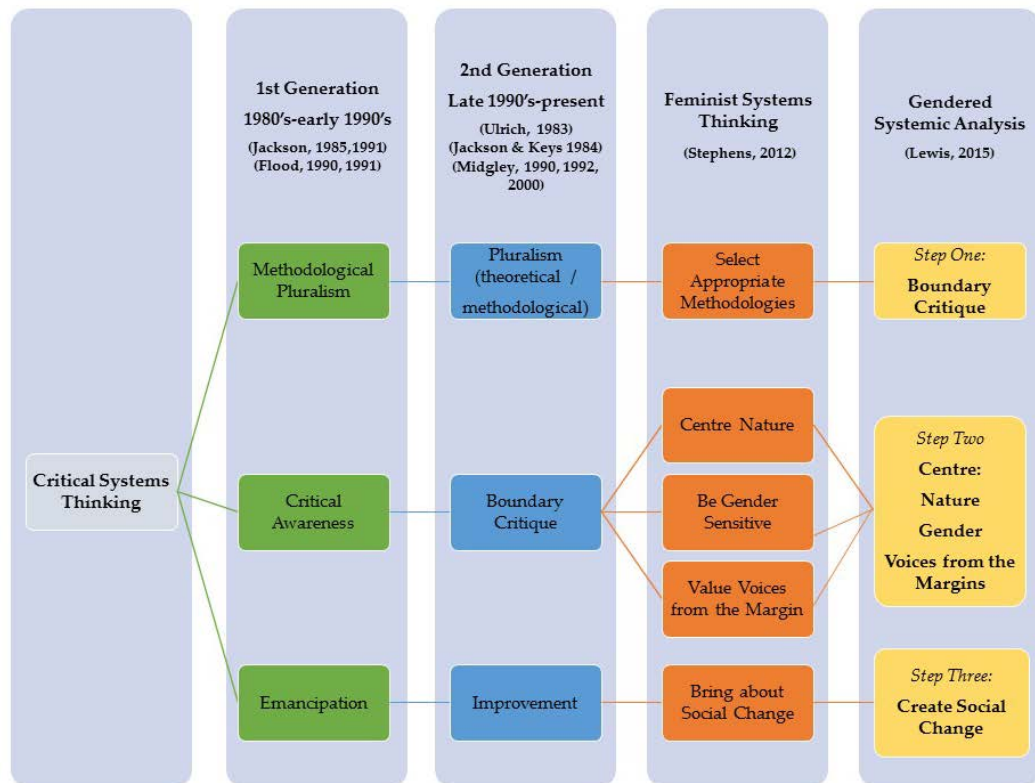


Figure 8-18 - From CST to FST to GSA

In this chapter Stephens' Feminist Systems Thinking framework was transformed into a method for use by non-practitioners and practitioners alike. The changes to the Feminist Systems Thinking framework had many contributing factors, but one primary outcome. What was once a theoretical framework (which still serves as a profound foundation to this work) is now a practical method situated in systemic intervention that will still need to be piloted to test its applicability and transferability. My goal in the Nicaraguan workshops was to introduce (and encourage ownership), of systems thinking, by increasing the awareness and practice around individual empowerment and agency to create 'what ought to be' defined by individual stakeholders' participation and reflexivity about what social change, if any, they chose to adopt. With a commitment to Feminist Systems Thinking 'through participatory, emancipatory and reflective actions and research practices, we

can 'make things whole again'" (Stephens, 2013a:3). The dispossession of voice and agency in developing countries, especially for women and other marginalised groups is shaped by societal norms that both women and men embody, and which can be more dominant in rural communities, exacerbated by poverty, location and other socioeconomic constraints (Gammage et al., 2016). My hope for the women and men I worked with in Washington, D.C. and Nicaragua is that they use Feminist Systems Thinking theory and the new method to reflect critically on their own lives and businesses as way to identify and take action for improvement based on their own needs, priorities and agency.

Chapter 9 Thesis Conclusion

This study set out to create and test a new method which would adapt and further improve Stephens' (2013a) Feminist Systems Thinking theoretical framework. The Feminist Systems Thinking framework, with its five ethical principles (being gender sensitive, valuing voices from the margins, bringing social change, centring nature and embracing a pluralistic methodological approach), offers reflective guidelines to be used during planning, implementation or in retrospect by practitioners. As Stephens (2013) explains, the Feminist Systems Thinking principles are not arranged hierarchically (i.e., one should not be privileged over the others), and they have the flexibility to be included in a project or not as desired or appropriate. This flexibility was ultimately a constraint on the effectiveness of the framework as it was used in my intervention.

I would suggest that the transition from a discourse of emancipation to one of improvement in CST has essentially marginalised the debate around emancipation, and this has led to the prevalence of a systems practice that does not explicitly or routinely consider gender. Too many other understandings of improvement have crowded in, making gender a largely invisible issue in the world of CST theory and practice. An added dilemma in CST literature that is the term 'improvement' assumes a given common or observed benchmark that is agreed upon and shared. Yet, emancipation for me means a liberation from the self, which is individually defined, with iterative cycles of reflection and change/improvement that have no particular middle or end. A narrower focus on human emancipation might have prevented this, as phrases like 'the emancipation of women' are commonly used in the West.

This research has contributed to CST epistemology in one significant way, particularly for development contexts. Participatory ideals and decisions around inclusion or exclusion in a systemic intervention are well documented within CST. What is less developed is the level of participation by stakeholders

and the primacy of their knowledge to guide the desired change. People in their own cultures understand nuances about social constructs intrinsically more than those from outside the problem contexts. On the path of gender equality, all members of a given society need to be included in identifying, designing and implementing the seismic cultural change that is required to achieve an egalitarian society.

9.1 Chapter Structure

This final chapter has four sections following this introductory one. In Section 9.2, I will review my research questions and emergent answers, highlighting their contribution to knowledge. Sections 9.3 talks briefly about the limitations of this research, and Section 9.4 suggests future research opportunities.

9.2 Contribution to Knowledge

Doctoral research, at its essential core, is about the creation of new knowledge (Tracy, 2013) . For my research, this knowledge creation was being conducted on two 'levels'. One was at the 'ground level' on the issues brought into discussion by participants, University and NGO staff, which were then subject to Feminist Systems Thinking dialogue resulting in the co-creation of questions and answers that informed GSA. However, at another level, I was conducting reflective research on the Feminist Systems Thinking contribution to this co-creation. As illustrated in feminist standpoint theory (Gorelick, 1991; Harding, 2012; Crasnow, 2014; Bowell, 2015), the stakeholders and I both had situational knowledge. For the participants their experiences and knowledge guided them to create solutions for improvement to their own systems and for me, the process informed how GSA needed to develop. The new knowledge ultimately emerged as a method that, through future implementations, has the potential to contribute to our understanding of human and non-human worlds.

The new awareness that was generated from this research is exemplified by a participant's comment:

“The word systems thinking is a fundamental term for all of us to understand and use. There are many things we can improve, day to day, in each one of our businesses. The practical exercises showed us how to adapt the ideas to our own businesses. We shouldn't wait until more trainings are brought to us to implement these changes, we should take it upon ourselves to make the changes, day by day” (UNA San Carlos Rural Development Participant, 2014)

9.2.1 Research Question #1

My systemic intervention explored three research questions. Primarily, how can Stephens' (2013a) Feminist Systems Thinking ethical framework be further advanced in a culturally relevant way to support people in a development context? This question was answered differently in Chapters Seven and Eight, based on the stakeholder group's needs and concerns. In Chapter Seven, where I worked primarily with the Nicaraguan Agricultural Network's staff and hosts, it was evident that, although the staff understood the objective of gender equality, they needed more time to process and reflect on how Feminist Systems Thinking could be incorporated into their field work with rural farmers without undermining their own personal values of inclusivity. As the staff disclosed, independently and collectively, there was a lingering, negative historical context of feminism (and by association, gender equality) that was externally superimposed onto Nicaragua from Western ideologies that were “anti-men” and “violent”. More time with the staff would have allowed me to better understand their experiences and we may have been able to acculturate Feminist Systems Thinking into language and tools for which they could authentically advocate. The outcomes from Phase Two with the Network Programme were more at an individual level rather than organisational. In this

sense, gender equality did not become gender mainstreamed; the conversations and discussions had only just begun.

In Chapter Eight, however, Feminist Systems Thinking was transformed from a non-hierarchical framework to a culturally responsive methodology and process which empowered rural business owners to make self-identified improvements that prioritised gender, nature and voices from the margins. In many cases, this resulted in creating social change that the participants themselves chose as priorities.

9.2.1.1 Methodological Learning #1

From a systemic intervention perspective I learned that people were able to easily understand the complexity of systems thinking and apply it to their own lives. As interventionists, we often do not explain the methodology we are using to stakeholders for fear it will bog down the process or discussions and therefore slow down change. I found the opposite. Introducing systems thinking that is culturally adapted using local artefacts and language to explain the concepts facilitated learning and suggested that the change processes would continue beyond the workshop participation for they now were now the 'experts'.

9.2.2 Research Question #2

The second research question asks what are the strengths and weaknesses of Feminist Systems Thinking within a global development context such as Nicaragua. Referring to both Chapters Six and Seven of the fieldwork, the strengths were as Stephens (2013a:8) had intimated: it provided "common-sense guidelines" that most people were able to easily understand and adapt to their own situations. Stakeholders also saw the value in using gender, nature and marginalised voices as areas where improvements could be identified within each of their own lives.

Feminist Systems Thinking's drawbacks surfaced in two threads; language and process. For all stakeholder groups (NGO staff, the university faculty and students, and rural business owners), the terminology in Feminist Systems Thinking needed to be made more culturally accessible. 'Appropriate methodologies' had little relevance for non-academics or non-practitioners, yet the idea of analysing a system to look for areas of improvement was much more effective. As is to be anticipated when bringing in any theoretical concepts from one culture to another, certain terminology needed to be 'translated' or 'adapted' to create local meaning (e.g. the term 'feminism' was dropped, and 'marginalised voices' switched for 'vulnerable voices').

The most significant change to Feminist Systems Thinking was to its non-hierarchical nature. The flexibility of Feminist Systems Thinking in the end was constraining for stakeholders who were new to systems thinking and to critical reflection as a business process. They benefited from an analysis where first one identifies the parameters of the systems to work with using boundary critique. The next step requires reflection on the identified system using the three lenses of gender, nature and vulnerable voices, looking for opportunity for improvements. Lastly, once the improvement opportunities were identified, an action plan could be created to stimulate social change. Referring back to the GAD literature (Derbyshire, 2002; Walby, 2005), in the GSA method I introduced an ethical priority to reflect on each element before deciding on its applicability (or not) to participants' business.

9.2.2.1 Methodological Learning #2

The key principle of a systemic interventions is to remain flexible, use a pluralistic mind-set to theoretical lenses, methodologies, methods and perspectives. What was also essential for Feminist Systems Thinking was to work in partnership with stakeholders to study the theoretical underpinnings and encourage the reinterpretation of their significance within any given context. Once the stakeholders have contextualised the framework, they were

able to adopt a more systemic approach and apply their new knowledge to other problems contexts.

“...as with many evolving practices and innovations, like changing from a horse and cart to a microbus, which emits smoke, and contaminates the environment. There are companies that do not think about this, they only consider about their money and not whether they are destroying nature. This is a very important tool [Feminist Systems Thinking] we have learned and hopefully it could be shared in other parts of the country”(UNA San Carlos Rural Development Participant, 2014) .

9.2.3 Research Question #3

The final research question sought to understand what needed to change within the Feminist Systems Thinking framework, to transition from a theoretical process into an intervention tool for practitioners and rural entrepreneurs, while still valuing its original ethical underpinnings. As I indicated in the previous paragraph, Feminist Systems Thinking became the GSA methodological approach, with each principle in its new formation requiring critical reflection as part of the boundary critique that can help to systemically define issues and lead to the creation of better social change.

9.2.3.1 Methodological Learning #3

According to Burns (2016: no pagination):

“In traditional research rigour is defined in part by the consistency with which the methodology is applied. So much so that the ‘subjects’ of research are determined by the reach that is possible within the methodology. In our research the opposite is the case. A key criteria of rigour is that the research engages with the right people and that often means adapting the methodologies to fit the people!

For a systemic intervention, conducting a boundary analysis to engage with the 'right' people for the problem context is a central and reiterative activity. Creating a method to help support stakeholders to do their own boundary analysis on their own problem context created new broader pathways for reflection, learning and change. At different points in my research, the stakeholders conducted their own boundary critiques and were able to identify other inclusions and exclusions of perspectives or systems that they needed to consider.

9.3 Limitations

No academic contribution is free from limitations, and my contribution is no exception. First, as is the case with most contemporary doctoral research in the U.K. academic environment, a three-year research degree which includes global fieldwork is curiously short. The dispersed geographical locations I needed to reach, coupled with limited access to transportation to the rural communities, meant that I mostly spent 3-4 hours with each group. These time constraints meant that there was inadequate time to build trust and relationships while building a better understanding of the nuances of gender equality within each community.

A significant limitation, linked to the time constraints of a PhD, was that I could only test these ideas in one developing country context. Checkland (1981) talks about the need, through systemic action research, to transfer and adapt ideas to multiple, diverse contexts before a strong claim can be made for wide spread applicability. Checkland has been testing his own Soft Systems Methodology for over forty years, and such an extended research programme was always going to be well beyond my capacity in PhD fieldwork. Nevertheless, I have made a start, and I claim, based on the work of Stephens (2013a) and myself, that there is the potential for further transferral and possibly further adaptation to new cultural contexts.

Other limitations were personal ones: for instance, I was very new to both the systems and the gender and development literatures, which meant that my understanding of my research contribution was still evolving quite late in my fieldwork and thereafter. However, this is all part of the learning process of undertaking a PhD, and I am certainly better prepared for future research than I was at the beginning of this journey.

9.4 Future Research

The possibility of future research for Feminist Systems Thinking and GSA is very timely and appropriate to discuss. As Prime Minister Trudeau (in Canada) eloquently identified, the time for gender equality is overdue in the 21st century. There is an opportunity to create a detailed GSA/Feminist Systems Thinking evaluation tool that could be used by the different hierarchical levels of global NGOs working in development situations. This tool could be assessable by practitioners, NGO staff and rural business owners and communities.

I also believe that the Critical Systems Thinking community has the interest and obligation to use gender analysis as part of any boundary critique. Marginalisation on the basis of gender exists, and if we as systems scientists are committed to 'improvement', then including gender as an integral element in critical reflection is essential. How to build gender analysis into boundary critiques within and outside of development contexts, and especially in brief interventions when the scope for it is limited, requires further research.

A future research path can also be the development of more systemic intervention methods to support *any* stakeholder group to become systems thinkers and interventionists.

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Appendix A

Scoping Protocol for Organisation Development Volunteers

Interview Questions and Notes
Conducted via Phone: 18 April – 8 May 2014

Relationship Building Questions

1. Before starting, are there any questions you have for me about my research or any other questions about this process?
2. Do you feel you understood the consent form you signed? Any questions about the form?
3. What is your current position (with the Partners F2F) programme, local NGO, greenhouse association, etc.)?
4. What did you like best about your assignment? What were the challenges?

Responses

- 5 women 2 men
- Guyana: 2 persons (once each time/2 weeks), worked with women's cooperative (internal conflicts x 2) and a crop growing,
- Farmer to Farmer for 14 years
- Eastern Europe, Africa, LA, Caribbean
- Nicaragua, 1 solo
- Honduras: 1 solo
- Dominican Republic
- Capacity Building, OD, ag extension
- Community Development educator in Wisconsin
- Community Resource Development Educator, does OD, lean government, outcome measurements, broadband access, how to get people to talk with each other.
- Travelled to Nicaragua for Partners (2007) women's leadership conference not F2F
- Community and Natural Resources and Economic educator connects resources and research to community
- Process, OD, facilitation problem solving, strategic planning with communities (16 years)
- Amazing learners (staff)
- Opportunity to be somewhere I have never been before and work with real people
- Like the challenges to try on things you never did before

- When people say 'I can do this (strategic plan)! Faces light up. I can do my own business now.'
- It gets people on the same page, reach consensus as a group
- Likes connecting with people, felt she could contribute to their greater success by helping them resolving conflict, like thinking on her feet, had some ideas about what needed to be done, liked team teaching, spent most days with women from Trafalgar
- Liked interacting with people, got chance to use skills that were dormant
- Is mission driven and works with poverty issues, community issues
- Used skills that she didn't use all the time
- The people, receptivity, opportunity to help people, how authentic they were and wasn't a lot of resistance to use the information
- Systemically struggled with environmental strategies where projects were not sound
- Revered and respect teachers, and answers were more 'parroted' versus independent thinking
- Wasn't sure of what the end user goals were
- Felt like she was doing things 'to them'
- Better to spend more time with a group
- Never knew what we were going there for
- Staying on top of what needs to be done from what is happening every day
- It's hard to prepare for and teach simultaneously...OD work is more tailored
- Was not debriefed
- Could be interested in supporting the group post meeting not sure how it would work
- Trying to do a strategic plan, especially farmers, in a two-day process. It really wipes people out.
- Have been asked to do a SP in an afternoon, example 80 people for an afternoon session,
- Five-year funding cycle, and previous projects are dropped, and new strategies are introduced and projects abruptly end from value change to climate change. Not an integrated approach.
- Lack of language skills
- I'd be happy to go back and do work with same groups to see how they are doing. I rarely get that offer or request.
- Longer term support post TA visit ongoing check-ins could be good. Some groups would be hesitant in case they haven't made a lot of progress.
- Volunteers are eager to create and maintain relationships
- Very little follow-up or feedback to volunteers. You never know how you were taken.

- Trying to figure out what the role of the different stakeholders were and helping them get organized and strategies and narrowing down the list of things to do.
- Disappointed didn't hear more feedback from F2F
- Am I asking the right questions to bring them some value in such a short period of time?
- Hasn't had any communication from F2F since project a year ago
- when resume/applications submitted, didn't hear back from F2F for months
- Debriefing after each assignment, both from volunteer's experience and recipient's perspectives.
- Systematize the feedback loop, pre-trip: interview with other volunteers that have worked with specific groups, are it built on someone's/ recommendations
- Didn't hear anything afterwards, was very frustrating.
- OD is a confidential process that creates a barrier for F2F volunteer to know what to share and not to share putting the participants at risk with the F2F programme
- The Contractor (USAID) didn't understand the culture that the women thought if you have a business, you should have money. They didn't know that businesses fail.
- Dealing with conflict people have to deal with assumptions at a deep level and that is hard to deal with in a two-week assignment.
- Field officers have the most contact with hosts, what training are we giving them around organization development and human capacity building to do ongoing
- Be interested in learning more about the project post visit to learn about progress based on recommendations

Sources of Motivation Questions⁷⁰

5. **From your experience, what should the goals be of the F2F organisation development (i.e., the group and human dynamic processes) efforts?**

Responses

- Similar to extension goals, to build capacity of groups to make their own and owned decisions, think critically
- There wasn't a lot of experience on OD, didn't know how to
- An orientation to what OD is for people on the ground
- Not sure it's working

⁷⁰ Adapted from Ulrich (1983) and Midgley (1997a).

- Goals should go both ways. She came back from experience much better understanding of some of the challenges in other countries and it impacts my politics and decision making here. Removing your own cultural lens, you look through and our past experience why people are doing what they are doing without judging why they are doing. Operating in someone else's system changes how you view the world
 - Capacity building human capacity, integrated approach.
 - OD should be more about how they do business, not topical. Need to be supported more latterly, a bigger group community development groups that came into training, beyond F2F projects, they would be able to support each other instead of consultants coming in to do interventions.
 - Creating a peer support/learning within community for ongoing support
 - The Voice Project in Nicaragua, brought women together from all over the country, come together, go back to their community to teach them and then reunite a month later to create a learning loop
 - People's position vs their interest
 - When people teach this, they learn it better.
 - Strengthen organizations
 - Would have liked to work in a team
 - Build the capacity of NGOs that can be sustained across time, partnerships and alliances between them, so the systems can generate it positively and therefore doesn't need outside volunteers.
 - Include Capacity development time of the F2F offices with volunteer time as part of the efforts.
- 6. With your previous answer in mind, how do you know if the organisation development efforts are successful? Do you have some examples you can tell me about?**

Responses

- Did six-month review, some application some not
- Not strong evidence about application of skills by field officers
- Opportunity to create a cross disciplinary team to give more context for the OD team
- If your goals are pretty simple, yes. They did learn a different way how to be in the future.
- USAID wanted them to operate as a business, but they are dependent on each other for survival, they can't. They need for survival would trump the need to be a more effective business.
- Varies...feasibility of training centre determined it wasn't feasible and it stopped the whole project (has set up training centres before) because it wanted to be a self-sustainable centre (Armenia)
- Didn't know if it was a success, never heard
- I have no long term outcomes that we were able to gauge.

- We were able to see action plans that indicated that groups were interested in working together to make changes.
7. **Who should benefit from the organisation development (i.e., the group and human dynamic processes) efforts provided by the F2F programme?**

Responses

- The people, that F2F is working with,
- Varied; national level (Nigeria) NGO, local people, small farmers
- If you address the higher level system that supports that line staff, then the effects will have a cascading effect.

Sources of Power Questions⁷¹

How is the need for gender equity addressed at the cooperative level?

Why would the decision makers listen to the women farmers?

8. At the country level, *how* is the need for organisation development identified? What about at the farmer level?
9. At the country level, *when* is the need for organisation development identified? What about at the farmer level?
10. Who currently determines what type of organisation development is needed for each F2F country programme? What about at the farmer level?

Responses

- From the Country Coordinator conversation and Arlen, saw a lot of dependency of groups on F2F office
- No idea how the farmers are involved, all putting the eggs in one basket and hoping for the best. 'we did it to them'
- No evidence of diagnosis of project, did some once in the field
- Do capacity building on how to do organisational assessment with hosts.
- At the country level...doesn't have any idea
- At the farmer level? USAID had flagged the women's group as needing support on conflict those were share with Wisconsin
- Did need assessment once down there, the relationship with between the farmers and USAID not internal as much
- A little foggy on how they sort the needs out.
- Spend the first two days trying to listen to what the issues are from both sides of the conflict. The western folks had a lot of assumptions about how the women's business should be'.
- Kelvin (country coordinator) and stakeholders was involved in deciding a strategic plan was needed for the bee keepers as a way to build the

⁷¹ Adapted from Ulrich (1983) and Midgley (1997a).

small organization. It was smart to bring an OD person and a beekeeper who could contribute at multiple levels.

- F2F wasn't exactly clear on what they wanted and prior to trip working with DC offices to identify what could be done.
- There was not an understanding of what constitutes OD by F2F staff.
- Farmers were not involved, the NGOs and country offices.
- F2F needs to do an assessment of the hosts along with the technical experts to identify a comprehensive plan what volunteers are needed

11. Who should be able to change or adapt what counts as a success?

12. You've said that _____ should be able to decide how success is defined.

Is there anything that _____ should not have control of or any say in?

Responses

- Thinks so from some real-time feedback in the field
- Washington DC used some of the materials they used
- Heard back from colleagues about some of the updates a year later
- Three different teams of consultants and conflict still an issue.
- The participants, the F2F, USAID (the parties involved)
- Day to day feedback was reinforcing their approach.
- Changed their approach from USAID's goal to make them better farmers to how to communicate between women and
- Host group, volunteer should have input
- Take a look and see, if consensus has been reached on how to move forward
- Do groups ever have a chance to see what a successful meeting is run? (Trafalgar).
- The four P's for having a decent meeting: Purpose, people, preparation and process.
- Have mixed feelings about the success, never got much feedback.
- Much of the work of OD generates documents that are 'living' and need ongoing support and emphasis that may not be understood by F2F groups.
- The people that receive the support and what the difference should look like versus guessing.

13. Gender Sensitive⁷²

- a. Given that one of F2F goals' is to 'consider impacts on both men and women while ensuring equitable participation and access to benefits by women' (USAID, 2013), how should these goals be represented in the F2F organisation development (i.e., the group and human dynamic processes) efforts?

⁷² (Stephens, 2013a).

- b. With your previous answer in mind, how do you know if the equitable participation efforts are successful? Do you have some examples you can tell me about?
- c. How women's unique voices to be included in the future are design/redesign of the programme?

Responses

- Did not detect a male dominated culture in Guyana, it was hard to tell. Wasn't really trying to include women, it wasn't discussed.
- Women had input to project through one leader. They had no input about
- Women didn't know how to express their hopes and their values, we only had one day
- Worked primarily with a group of women...was in a parade of many people who worked with the same group
- I don't know that they had a lot of voice in the OD stuff. Listened to the women and they had really different stories than what the task they were brought down to accomplish.
- When working with groups at grassroots level, you see women participating, but at the higher levels in the country programmes, very few women are involved.
- Never asked to specifically build women's capacity within any of my projects.
- We didn't make a distinction on who participated. Most of the beekeepers were men. No issues for those women that did participate.

14. Value Voices from the Margin⁷³

- a. We talked earlier about strengthening both individuals and groups as they work to achieve their goals and dreams through the F2F funding. Should there be other people/voices included, other than those directly funded, whose voices may not sometimes be considered?
- b. F2F projects often include the funding of livestock (e.g. ducks, sheep, and bees). What consideration should they be given in the F2F capacity development efforts?

Responses

- A bulldozer in the rainforest, man helping was really good at growing things in sand
- No eco-systems thinking very short termed thinking, environment was secondary. No sense of the capacity of the aquifer capacity

⁷³ (Stephens, 2013a).

- Listened to all involve parties, not a lot of communication between UDAID and the women
- Youth are rarely included.

15. Centre Nature⁷⁴

- Didn't hear anything about the environment. We toured other F2F volunteers were doing which helped us understand more the country context.
- Their location was very isolated from anywhere impact their ability to make something happen out of nothing
- Nature and non-human issues not addressed, its value change, how to get farmers to get a better income.
- Wasn't there long enough to learn about the culture on this topic.
- They did understand that bees were essential to the future of Guyana and efforts needed to made from an ecological stand point to promote change.
- It is harder to think of insects/bees as something to be something to be respected, yet there needs to be a mutual respect.

16. Social Change⁷⁵

- a. What long-term social change will result from this project for:
 - ✓ Women farmers
 - ✓ Local to large scale environmental sustainability goals
 - ✓ Livestock wellbeing (i.e. ducks, sheep, and bees)

Responses

- No long term social change. Hope that we planted some ideas and gave them time to share. It might have an opposite effect to what we have
- OD is a long-term relationship. Need to diagnose ahead of time. Staging out a progress of a period of weeks with different volunteers. All working on same developmental process One group is diagnose, next we are going to do asset based assessment, then the ripples from, if it could build on previous work
- Probably not. Minor lessons like doing a better job listening, new ideas and concepts were introduced.
- Ideally it would include teachable moments in the work. Process and content.
- The technical ones are just worried about making more money, which could result in sending kids to school, better livelihood. The project level, not so much.
- Organizational ones, yes, when you get people working together and they realized what they can accomplished if they are organized and have a simple plan, then they see the possibility of other changes.

⁷⁴ (Stephens, 2013a).

⁷⁵ (Stephens, 2013a).

Sources of Knowledge Questions⁷⁶

17. Who should be involved in helping to design the F2F organisation development (i.e., the group and human dynamic processes) efforts?
18. Thinking of expertise in the broadest definition/sense (technical, social, knowledge, experience, people, etc.), what kind of expertise should be included in the organisation development system design?
19. Is there expertise involved that should continue?
20. Is there expertise that should be changed/different?
21. Who or what should be relied on to ensure success of the organisation development efforts?

Responses

- Country office and field staff working with an OD at the Washington level to guide the overall strategies. Need the local dynamics and someone who has the historical picture to tie the short term volunteers work together? You can get blinded coming in from the outside by the unknowns and having to do that on the fly.
- Community development is it really OD that is needed or CD, collaborative, assets based, principles of community development how do you build the capacity of everybody to make changes. Who could be involved in the F2F work as a community effort
- Knows nothing about F2F
- Need more coaching on the connection between the technical work and OD work
- Folks that have had some success on the OD front, how this can work,
- A train the train the trainer programme of staff is a better approach. Would be very beneficial
- Have a better handle on what the issues are. Pre interview with the groups. More time in an actual environment,
- A coaching role, because we are not there when you they apply them
- More frequent visits, with a focused plan. It confuses people to have different ideas and consultants. Not so scattershot.
- The community, the government people who provide services, other affiliated NGOs that have expertise and knowledge in the technical sense.

Sources of Legitimization Questions⁷⁷

22. Who should be an advocate/have voice for F2F organisation development efforts?

⁷⁶ Adapted from Ulrich (1983) and Midgley (1997a).

⁷⁷ Adapted from Ulrich (1983) and Midgley (1997a).

23. **Given that your organisation offers a service, to *what extent should you be free to do something different or request something different based on your knowledge, experience or intuition?***
24. **Given that your organisation offers a service, to *what extent should the recipients be free to do something different or request something different than what you suggest?***
25. **What should be the compelling case for the inclusion of organisation development strategies in the F2F programme? Does the current system deliver on that compelling case? (i.e., Professional field/world view/local view)**

Responses

- The people receiving it, Latin word 'facile' what do you need out of this?
- We had the flexibility to change our efforts, there were time constraints. The ability to follow through, and the travel time was a loss of time
- The group had the voice to change the focus, don't know if they know that
- Compelling case to include OD, yes, are we delivering that? If they are pairing cross disciplinary teams, then yes.
- We took a different approach. Had the message 'go and fix these ladies'. Versus what can we do to help you in this current situation...? USAID wanted them to 'make them better business people'
- Within the realm of possibility based on the skills of the consultants
- All education should be needs based so they will apply it.
- Often organizations fall apart not because they aren't good farmers but because can't work together, create change or move and initiative forward and its fundamental people can't work together to get things done.
- Strictly technical knowledge shifts to organizational
- People with feet on the ground in those areas, other NGOs, government reps that are familiar with the areas.
- As a consultant, I am quite able to make changes; you are never quite sure what the work is, especially in the Caribbean.
- When recipients want to make changes, as long it's a mutual decision make with volunteer.
- compelling case: groups need to be functional for the good of the whole group
- Does F2F deliver? Sometimes yes, sometimes no. depends on assignment.

Closing

26. **Is there anything else you would like to share about the role organisation development included in the F2F programme that I haven't asked about?**
27. **Any final questions or observations?**

28. Is there a question I didn't ask that you think might be relevant?

Responses

- What are we in the first world doing down there? How is it respectful and how F2F is doing that?
- We believe in the technical fix
- OD is important and tricky to do in the same framework that technical knowledge is shared. People really appreciate the help that it made a difference in their personal and professional life and it needs more consistent reinforcement.

Appendix B

University of Hull: Centre for Systems Studies
Workshop: Systems Thinking: Thinking Together
 Agenda (May 2014)

Workshop Purpose: Micro and small businesses owners are introduced to (Feminist) Systems Thinking (ST) and are able to apply the concepts to their own enterprises for improvement through the analysis of the roles of gender, nature, marginalised voices, variety of methods for problem and the facilitation of social change.

Workshop Objectives:

- Introduce Systems Thinking as a means to strengthen micro and small enterprises.
- Practice identification of specific business strengths and weaknesses through the use of ST.
- Use of ST tools as a means to inspire action (change)
- Engage a broad cadre of stakeholders in implementation planning and decision making utilizing ST.

Time	Agenda Item and Objective	Process Details	Facilitator(s)	Supplies
9:00– 9:05 (5 min)	Welcome - agenda review <i>Provide summary of day's activities</i>	<ul style="list-style-type: none"> ▪ Welcome participants, a brief overview is provided of the day ▪ Review Agenda ▪ Review research striving to support self-identified opportunities by participants for improvement and change ensuring the tool is culturally relevant and has local impact. ▪ You as participants have knowledge that is important and relevant to this research and beyond ▪ We all have equal roles in team learning, teaching ▪ Link and build on themes from the previous workshop (self-esteem, commitment, motivation and organisation) 		Slides 1-4
9:05- 9:10 (5 min)	Working Agreements <i>Determine group behavioural expectations</i>	<ul style="list-style-type: none"> ▪ Collaborative working agreements <ul style="list-style-type: none"> ▪ Help me to help facilitate this workshop ▪ Lots to cover, short amount of time ▪ Keep the group focused and on task 		Slide 5 Chart paper Markers Tape

9:10 – 9:30 (20 min)	Ice Breaker Activity <i>Set a tone of interactive fun and learning. Include all the voices in the room</i>	<p>Instructions (divide into groups by counting off)</p> <p>Round 1 (10 Minutes) - Exercise – 4-6 people – (objective: thinking systemically, build organisation capacity, decision making, problem solving, teamwork)</p> <ul style="list-style-type: none"> ▪ Scenario: one member has broken their leg and they don't have car – <ul style="list-style-type: none"> ✓ they need to get him/her to the clinic which is a block away- their task is to figure out how to do this safely ✓ transport the person to the clinic down the block (you don't have any other resources other than the 4-6 people) ▪ First: discuss how to solve this problem using the five (F)ST Principles ▪ Second: put your decisions into action! Get that person to the clinic! <p>Round 2 (10 Minutes)</p> <p>Scenario: now the situation is the same only now you have to get the person to Matagalpa (a farther distance) –</p> <ul style="list-style-type: none"> ▪ How will you do this? ▪ Was your starting point different from the first exercise? Why or why not? ▪ Did you do anything different from the first exercise? Why? 		Slide 6
9:30 – 9:45 (15 min)	<i>Introduction to Systems Thinking part 1</i>	<ul style="list-style-type: none"> ▪ Image of horse and carriage ▪ Brainstorm with the group: <ul style="list-style-type: none"> ▪ What are the different components of this system? ▪ What you know if you studied just the components? ▪ Would it be different if you study as a whole transport system? ▪ What impact do you as an observer of the system? 		Slide 7
9:45 – 9:55 (10 min)	<i>Introduction to Systems Thinking Part 2</i>	<p>YouTube video on ST in Spanish:</p> <p>http://youtu.be/pOhAyhhI2v0?t=44s</p> <p>Start: 00:44 Stop: 06:37</p>		Slide 8 Projector and internet Access
5 min	Being a systems thinker	<ul style="list-style-type: none"> ▪ What does it mean to be a person who thinks systemically? 		Slides 9-11

9:55-10:15 (15 min)	Feminist Systems Thinking Introduction	<ul style="list-style-type: none"> ▪ Introduce Feminist Systems Thinking Principles <ul style="list-style-type: none"> ▪ Gender Sensitive, Slides 12-15 ▪ Voices from the Margins, slides 16-17 ▪ Centre nature, slides 18-19 ▪ Social Change, slides 20-21 ▪ System Analysis, Slide 22-24 		<p>Slides 12-24 Capture on chart paper</p> <p>Have slides #12-23 on chart paper on walls</p>
10:15 – 10:20 (5 Min)	Large Group ST analysis <i>Practice analysis of a systems using Feminist Systems Thinking</i>	<ul style="list-style-type: none"> ▪ Using the horse and cart as a system, collaboratively identify the components of the systems as they apply the Feminist Systems Thinking model ▪ Write summary for each element ▪ Capture on chart paper. 		Slide 25
10:20-10:40 (20 Min)	Large Group Debrief of Activity <i>Share understanding of decisions made (boundary critique)</i>	<p>We will discuss the exercise in the context of PS (possible questions) -</p> <ul style="list-style-type: none"> ▪ What principle considered PS you first? Why? ▪ How many ways were there to solve this problem? ▪ What elements of the PS work well? ▪ What elements were more difficult to address? Why? ▪ What did you notice about yourselves as 'observers' while analysing the system. What made it easy to understand the system when you are part of it? What was difficult? 		Slide 26 Chart Paper (capture debrief) Markers Tape
10:45 – 11:00 (10 min)	BREAK			Slide 27

11:00 – 11:10 (5 min)	F Systems Thinking <i>Deepen application experience to actual enterprises</i>	Introduction <ul style="list-style-type: none"> • Count off to form groups 4-5 <ul style="list-style-type: none"> ◦ (Unknown, how many people from each enterprise, enough for their own group or is it mixed groups?) • One facilitator assigned per each group to support process/content (as necessary) • Introduce puzzle pieces and their role in helping to apply systems thinking. Puzzle pieces will mimic puzzle diagram and be able to interlock. 	Note to self: figure out how to include puzzle pieces	Slide 28 Feminist Systems Thinking pieces Charts paper Markers tape
11:10 – 11:55 (30 min)		Large Group Activity Part 1: <ul style="list-style-type: none"> ▪ In groups identify one enterprise to work on <ul style="list-style-type: none"> ▪ <i>Ask for a business from the group to use as an example</i> ▪ Analyse the business using the Feminist Systems Thinking principles, using the Systems Analysis element last. ▪ List three sub points within each principle that will be important analysis to gain a deeper understanding. <i>What are three key problems to consider within the chose principle</i> 		Chart Papers (2) for each group Markers
15 min		Large group Activity Part 2: <ul style="list-style-type: none"> • Pick one of the five elements on which to focus for this activity • Write a short action using template example 		Slide 29
11:55- 12:05 (10 Min)	Small Group debrief	<ul style="list-style-type: none"> ▪ What did you learn from the company they did not know before using Feminist Systems Thinking? ▪ What worked well using Feminist Systems Thinking to analyse your business? ▪ What did not work well? 		Slide 30
12:05 - 12:15 (10 min)	Large group debrief and Feminist Systems Thinking enhancement	<ul style="list-style-type: none"> ▪ What did you learn from the company they did not know before using Feminist Systems Thinking? ▪ What worked well using Feminist Systems Thinking to analyse your business? ▪ What did not work well? ▪ What did you learn about what is vs what ought to be? ▪ Any feedback/input from the whole group? 		Slide 31
12:15 12:30 (15 min)	Evaluation Survey <i>Group</i>	Group evaluation Usefulness of Workshop <ol style="list-style-type: none"> 1. Group Profit Workshop Evaluation <ol style="list-style-type: none"> 1.2. What do you like most about this workshop? 1.3. What you liked least? 		Slides 32-34

		<p>1.4. What could have been done differently?</p> <p>These questions ask you to evaluate the workshop processes from their own cultural perspective.</p> <p>4.1 From a "cultural" perspective, what are the strengths of the focus of this workshop were?</p> <p>4.2 What were the difficult to talk? Why?</p> <p>4.3 What things would you like to have seen done differently to better incorporate different cultural perspectives (in general or in relation to specific cultures)?</p>		
12:55 – 1:00	Thanks	<ul style="list-style-type: none"> ▪ Give out laminated wallet-size Feminist Systems Thinking model as thank you 		FST wallet cards
	One word	<ul style="list-style-type: none"> ▪ As a way of closing, ask each person to share one word that describes how they feel about what they have learned today. Caveat: If someone has said your word, please choose another. 		