

# Closing editorial

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# Immersions: reflections on practice

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**In this closing article we will review 'good practice' in relation to immersions, while also noting the difficulties in reaching any meaningful assessment of their long-term impact. We will discuss the ethical dilemmas they raise, and argue that the next phase of immersion practice should find more creative ways of letting the voices of the hosts be heard, and of trying to answer the question posed in the introduction: 'What would those living in poverty want us to do?'**

## Introduction

Our aim in preparing this special issue of *Participatory Learning and Action* has been to communicate the diversity of immersion experience through the voices of those involved. As we near the end, it is for readers to draw their own conclusions about the limitations and potential benefits of the approaches discussed here. We can see that a critical mass of interest and energy has now been generated among donors, NGOs, and practitioners. The concern they all share is the ever-widening gap between those who choose to tackle poverty and those obliged to live it. For many of those who have shared their experience through this issue, immersions are one way of trying to reduce this gap.

## Elements of good practice

As Robert Chambers wrote at the beginning of this issue, there is no single formula. Each reality check, each EDP, each immersion has its own taste and flavour. The basic ingredients of host and visitor, and the environment within which the two interact, make up a recipe that is constantly changing. Nevertheless, although there is no one template to follow, most effective immersions share similar qualities.

## Adequate investment in preparation and orientation

Organisations which arrange immersions for others, such as SEWA and ActionAid, try to ensure that immersion participants receive a thorough orientation on the village they will be visiting and the family with which they will be staying. They also prepare the host community and host families, briefing them on their guests' interests, and emphasising the importance of treating them as equals. Even those who organise immersions on their own initiative take the time to familiarise themselves with the culture and context of the place they are visiting. Of course, the degree of orientation varies according to the needs of those involved: a European Member of Parliament on her first visit to a rural village in Asia may require a different level of support from an experienced EDP participant.

**DfID staff and local government representatives meet the village doctor for lunch during an immersion in China.**



Photo: ActionAid

However, familiarity should not be assumed. When appointing new staff, Indian NGOs such as PRADAN and SRIJAN organise a prolonged stay for candidates in a village environment precisely because of the cultural and class divide between many of their applicants and the rural poor. Jörg Hilgers writes of Tanzanian government officials who, after an EDP in 2007, came to appreciate the gap between their lives in the capital and the 'colour and taste' of poverty. No-one, as Ravi Kanbur eloquently reminds us in his story about the temple in Ganeshpura, has nothing left to learn.

#### **Appropriate facilitation and interpretation**

In most cases some kind of bridge is needed between the worlds of host and visitor. This may be provided by a skilled facilitator and/or interpreter, often mediated through a local

NGO. In some cases this bridge has to span a chasm – the wide gulf in life chances between different human beings. For those who genuinely seek to understand what lies on the other side, immersions can be profoundly emotional experiences. So experienced facilitation is essential. Dee Jupp concludes her article by noting that immersion facilitators may best be sought from those with a background in counselling or mentoring.

Organisations that arrange immersions need to be aware of the powerful position they hold. Some may plan the event in ways that reinforce their own agenda, consciously or unconsciously reproducing certain biases through their choice of location or community. Visitors need to be aware of the possibility of being misled. Facilitators and interpreters also have a difficult balancing act. Their work is critical to the success of an

**Getting to know each other: an immersion in Khosolo, Malawi.**



Photo: ActionAid

immersion, but they must avoid overstepping their roles as mediators. In the words of the EDP Association, interpreters should be 'there but not there'. They are 'the mirror through which the host and the guests look at each other'.

But facilitation is not simply about helping visitors deal with the shock of the new. It aims to ensure that participants maximise what they learn from the experience. What does this learning involve? The personal testimonies in Section 3 give us some idea. Despite the rhetoric that surrounds immersions – of 'learning from the poor' – it is often richness rather than deprivation that lingers in visitors' memories. Saleiha Chachi, whose home is a remote island in Bangladesh, 'inspired' John Samuel:

*She symbolises the thousands of unsung, unheard, and invisible leaders, both women and men, who make change happen.*

For Taaka Awori, poverty

*...ticked my consciousness at the fringes but never came and took a front seat... For 3 days the greetings, the family meetings, and the stories revealed a positive side of African culture that I knew existed but had forgotten.*

Bosse Kramsjö writes that during follow-up seminars for participants in the Global School, people 'don't feel pity; they miss friends they will probably never meet again'. Good facilitators help visitors and hosts recognise what they have in common, as much as what divides them.

**A willingness to embrace the personal and the unexpected**  
The reactions of participants are often unashamedly

emotional. Almost all of those who have written about immersions emphasise that it is the combination of heart and head that changes practice. James Wolfensohn, writes Fred Nunes, wanted managers in the World Bank with both emotion and intellect. Bosse Kramsjö acknowledges that some will dismiss 'the emotional part' as 'software nonsense', but then asks how can people's thinking shift without emotional involvement?

Some of the most profound learning and change results from experiences that are unplanned. Those organising immersions need to find the right balance between preparation and flexibility. Immersions are essentially opportunities for experiential learning. They require participants to 'let go', to set aside the trappings of status and profession and simply engage with others as human beings. Immersions create the space within which this kind of interaction can happen.

**Legitimisation from employers and managers**

But emotion and happenstance take us only so far. Immersions should be more than feel-good experiences for development workers in need of rejuvenation. At some point they must be justified in terms which go beyond the individual – i.e. for their contribution to more effective projects and programmes and for their influence on policy. The articles by Poonam Shroff, Haider Yaqub, and Qazi Azmat Isa illustrate their potential value in these respects. Once immersions receive the support and endorsement of employers and senior managers, as has happened in Sida, they move beyond the preserve of the converted and become accepted organisational practice.

The preliminary findings of the Sida Reality Check Field Team in Bangladesh demonstrate why this matters. They give specific instances in which the experience of living with ordinary families, even for just a few days, throws new light on old assumptions about poverty-reduction strategies and highlights important policy implications. Those employed in aid and development agencies find themselves further removed from their ultimate clients than ever before. This may be due to shifts in donor priorities in favour of budget support and harmonisation, or the growing bureaucratisation of development practice. So strategies which consciously make space for this kind of direct contact are crucial. This is as true for officials in Southern governments as it is for the staff of foreign donors, particularly with the commitment, rhetorically at least, to devolution and partnership that characterises the 'New Aid Agenda' (Karl Osner).

## Ethical dilemmas

The concept of a 'good' immersion is problematic, since immersions also pose many ethical questions. Common to all immersions is a period of time living with a host family in a poor community, helping with household tasks and sharing in their lives. The most obvious dilemma, then, is whether the inevitable short-term burden on host families is compensated by the possibility of better policy and practice in the long term. And who assesses this trade-off?

The views of host families are difficult to hear. It is the threads of the visitors' reflections which are woven into stories and reports circulated to colleagues and managers on return, while their hosts slip back into relative obscurity. For the purpose of this issue we asked some of those who organise immersions to go back and talk with host families about their experiences. The results, a selection of which are included in Section 2, were interesting but possibly compromised: would host families have felt comfortable to speak freely, given the power that organisations such as SEWA and ActionAid undoubtedly exercise in any village where they work? As Ashish Shah writes, immersions are just as vulnerable to the same power dynamics as any other intervention, and must be built upon a pre-existing foundation of transparency and trust if they are to be meaningful.

The clearest impact on host families is the extra physical and financial burden on already poor households, particularly on women. For them, the burden of domestic and productive work is already great. But there are other, less obvious pressures: the intrusion into people's privacy and the subsequent publication of those conversations, as well as the anxiety felt by hosts for their guests' well-being and safety. As the SEWA members acknowledge, harsh physical labour in tobacco fields or on building sites no doubt gives visitors a unique insight into the hardships of their lives, but it also adds to their worries.

There are several responses to this dilemma. One is to find ways of reducing the burden. When immersion participants ask to help with household chores, this is not just to learn how heavy the water is or how back-breaking the weeding. It is done with the genuine intent of minimising the family's workload (even if in practice the results are less than perfect, as Ramilaben, a SEWA member, remembers). Financial needs are dealt with discretely. Organisations which facilitate immersions generally forbid visitors from paying their hosts or giving them gifts. But they ensure that families receive financial assistance or essential material support in advance of their guests' arrival. For rural societies where hospitality to guests is still a highly valued cultural norm, direct payment risks

**Sonya Ruparel and Kate Newman with village children during an ActionAid immersion in Bangladesh.**



Photo: Sonya Ruparel & Kate Newman

being seen as disrespectful or patronising. Some may interpret it as a way for those from relatively privileged backgrounds to assuage their guilt. But we also know of several individuals who use quiet back channels to demonstrate, anonymously, their appreciation to the communities which hosted them, and who regard this as a concrete expression of solidarity.

Another response is to design immersions in ways that bring about some practical benefit for host families. During the Views of the Poor study in Tanzania, some families learnt for the first time about their entitlements – that schooling was now free, or that they could get free or subsidised medicines. Most of the families who took part in the study had never been asked their opinion before. Host families, particularly the most marginalised, often report that opening their homes to guests raises their self-esteem and their status among their peers. Poor preparation, on the other hand, can leave hosts vulnerable to the ill-will of neighbours who assume that they have received significant monetary benefits. But when all involved have been well prepared, the experience can be positive. Long-term friendships have even been built.

Another factor should be considered when weighing up the burden on women. By bringing visitors right into the home, immersions offer insights into issues of gender and power which would otherwise be less apparent. In many cases, the standard Village Immersion Programme (VIP) visits undertaken by senior government, donor, or NGO officials take place in the public sphere. In many rural areas in particular, this is still the preserve of men. The VIPs will meet with a range of local dignitaries – the district commissioner, the head teacher, the chief, the priest – almost all of whom will be men. But in an immersion these same senior officials – many of

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whom are also powerful men – are brought right into the home, which in most cultures remains the preserve of women. They are encouraged to look at the world through their host woman's eyes – to do what she does and to hear what she says – and in so doing they may gain very different insights. This process may need careful facilitation – on the one hand ensuring that the visitors appreciate this dynamic, and on the other supporting the women through the encounter.

But is it right to make these intimate relationships public property? Jörg Hilgers and Karl Osner describe how essential the phases of reflection and dialogue are to the EDP methodology, when participants make sense of what they have learnt through group-based discussion. Sonya Ruparel also highlights the value of shared reflection and triangulation. If the benefits of immersions are ever to reach beyond the individuals who take part, then their implications and conclusions must be more widely shared. Moreover, most participants seem to feel strongly that naming their hosts and celebrating their lives in what they write after the event is a way of honouring them. And yet, as Edward de Bresnyan cautions, the expectation that one must share publicly what was learnt privately can be an uncomfortable one:

*... the instrument of our own learning is in fact the life of another human being, who has offered herself as an instrument of instruction.*

### Impact assessment

Another theme that runs through several of the articles is the difficulty of assessing the impact of immersions over the long term. The stories that we hear are just that – a snapshot, a glimpse, however striking or memorable into another person's world. Their power and impact on the individual visitor is not in doubt. Renwick Irvine, governance advisor with DfID in Nigeria, writes that:

*Not a day goes by when I don't think about the week that I spent in Katsit and refer to it frequently in my work, in my discussion with government on policy issues.*

However, we have little sense yet of the sum total of all this effort. Jörg Hilgers acknowledges that the EDP Association 'has not yet managed to measure personal and institutional impacts in a systematic and scientific way.' SEWA plans to set up a dedicated EDP unit, and one of its objectives will be to address this challenge. The articles by Fred Nunes and Sonya Ruparel illustrate some of the challenges in institutionalising immersion practice, even with leadership from the top. Turnover of staff, competing incentives, and rapid shifts in development fads and fashions can make it hard to sustain changed practice. Karl Osner acknowledges that after several decades of effort and experimentation only one official donor – Sida – has made a commitment to use immersions and reality checks to shape its development policy.

Impact assessment will also be problematic if the objectives of immersions are contested. Are they necessarily and only about understanding the lives of the poorest? As Ashish Shah suggests, while it is important to understand the perspective of a woman shunned by her in-laws to live her life in isolation, it may be equally important to understand the challenges faced by a rural government officer with no resources to work with. The aim of reality checks may rather be to capture as many diverse world views as possible, all of which help us craft a more honest and inclusive understanding of 'reality' and hence inform what we do.

One way in which the impact of immersions may be enhanced, particularly on policy development, is by arranging joint immersions which pair key staff from government, donor, or civil society organisations. Living and working together in a more informal setting may help build trust and understanding between actors. And the discussions and encounters during the immersion may provide a shared experience on which both can draw in subsequent policy dialogue. As Karl Osner writes, it is the 'human element' that makes institutions work effectively together. Immersions perhaps provide an environment where these personal ties can be strengthened.

The unique and highly personalised nature of immersions makes their impact assessment a particular challenge. And yet it is this aim of 'personalising' poverty that is one of their most valued outcomes. 'Making Poverty Personal', is the title of an ActionAid publication on immersions. 'Development has got a face', is EDP's motto. As Reema Nanavaty writes, the relationship between 'donor' and 'beneficiary' has

become so abstract and impersonal. Something is needed to restore a stronger sense of connection between the two, to counteract the bureaucratic culture which looks 'inwards and upwards, not downwards and outwards'.

### Where next?

Immersion, EDPs, and reality checks are still in their relative infancy, for reasons explored in the introduction. As a result, participants have until now been largely self-selecting – those, perhaps, already predisposed to honest reflection and questioning of the limitations of their practice. The challenge is to move beyond the converted, and to create a climate in which direct contact with those we serve, in whatever form this takes, is regarded as essential rather than exceptional in how we think about accountability and understand good practice.

There are optimistic signs. The renewed sense of energy behind the World Bank's Village Immersion Programme in South Asia; SEWA's decision to set up a dedicated EDP Unit; the commitment by Praxis to support learning across a network of practitioners interested in immersion. In the coming years we need greater investment in peer review mechanisms and processes which spread good practice and in some way capture the cumulative impact of immersion. A crucial part of this must involve listening more carefully to the experiences and priorities of hosts – particularly those

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whose voices are rarely heard.

Phebe Oriaro, who stayed with a rural family in western Kenya in March 2005, wrote that:

*Contact with very poor people is never easy. They rarely attend meetings. Their leaders will. If they attend, then they will not talk. To make them talk and be heard, we may be forced to go an extra mile.<sup>1</sup>*

Immersion are simply one way of trying to go that extra mile. If this issue succeeds in tempting more people to make that journey, and to learn for themselves about this thing called 'immersion', then it will have achieved a little of what it set out to do.

<sup>1</sup> *Mwangaza*, Issue 3, June 2005, ActionAid Western Region team.

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