Inclusion
for
transformation

REPÈRES

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F3E

Inclusion for transformation

ABOUT F3E

Created in 1994, the F3E is a network of actors in international solidarity and cooperation. By offering them complementary innovative methodologies (evaluation, capitalisation, change-oriented approaches, quality approach, gender approach, etc.), the F3E contributes to strengthening their skills. It encourages them to improve their practices in order to achieve an impact that brings about social change. It is a multi-actor network of over 90 French organisations: associations, NGOs, local authorities, networks, foundations and trade unions.

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CONTENTS

PREFACE

INCLUSION FOR TRANSFORMATION, A JOURNEY IN COLLECTIVE INTELLIGENCE

As a multi-actors French network for the evaluation of practices, our goal is to contribute to the enhancement of the skills of actorss involved in solidarity and international cooperation, and to improve the impact of their initiatives. Our ambition is the collective development of practices for the evaluation and investigation of initiatives for social change, both in France and internationally. Accordingly, F3E has embarked upon a process of collective reflection, as a means of fuelling this brief, which is intended to promote equitable and sustainable social change. For over 25 years, the F3E network has brought together nearly a hundred civil society organizations, territorial authorities and foundations, who have sustained their operations through the dynamics of a learning network.

Over the years, F3E has consistently undertaken the collective investigation of processes for the continuous improvement of initiatives. Together with its members, F3E trials innovative methodologies as levers for change and the reduction of inequalities, proposing approaches and methodologies which are appropriate to practitioners both in France and internationally: change-oriented approaches and the gender-based approach. Ever conscious of the need to expand this corpus of processes and methodologies, F3E is inspired by the practices of its members, and of other actorss involved in international solidarity or in the social and solidarity economy, as a means of lending substance to those reflections and enriching the tools it provides.

At the core of the reflections set out in this work lies the exploration of the assumption whereby inclusion constitutes a powerful lever for the promotion of the social changes which we wish to see. This has been observed, firstly, through the deployment of change-oriented approaches. These reflect the benefits of methodologies which are focused upon actorss, who are considered as essential agents of change. This has also been observed through our work on gender, particularly the intersectional gender approach, adopted by F3E in 2021. This permits the identification of exclusions associated with gender identity and sexual orientation, but also those associated with issues of race, class, age, health, etc..

Accordingly, in this work, we address our capacity for the adoption of inclusive practices which will be vehicles for equitable and sustainable social change. We raise the question: how are we to achieve *Inclusion for Transformation*?

In our view, it has been important here to provide some comparative analysis of the concept of inclusion, and to open up a pathway which, we hope, will provide actorss in social change with the resources to join us in the more detailed investigation of its practical implementation.

Inclusion for Transformation represents both a book and a learning process in collective intelligence. In order to produce this work, we have joined forces with practitioners from organizations who work for the promotion of social justice, both in France and internationally, consultants and researchers. Our objective was to provide a forum for exchanges between a plurality of actorss with a variety of experiences.

Our invitation for contributions was wide-ranging, resulting in the production of ten articles, which we are pleased to present here. We have received input from contributors living in France, but also in Colombia, Belgium, Benin, Ecuador, the USA and Senegal. We have organized a series of workshops, based upon peer-to-peer exchanges, as a facility for receptive communication between contributors and the provision of mutual support for the drafting of their articles. We would like to express our warmest thanks for their unfailing commitment throughout the participative process which led to the production of this work, and for communicating their thoughts and experiences in a spirit of authenticity.

The editorial committee which we have brought together has played a major role in this collective journey. Comprised of experienced persons from various backgrounds, this committee has addressed the issue of inclusion while delivering its own input and situated knowledge. This editorial committee has been responsible for the structuring of this work, and for the detailed review of each article, and has assumed the role of keynote speaker during the conduct of workshops. Its proposals

GLOSSARY

have had an extremely positive influence upon the quality of exchanges and articles. At this point, we would like to express our warmest thanks to the members of the editorial committee for the abundance of their commitment to this process.

We hope that these contributions will inspire you, and will encourage you to pursue, with us, the process of reflection on transformative inclusion.

Aude Hadley
Secours Catholique - Caritas France
For the Administrative Board of F3E

Claire de Rasilly
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For the *Inclusion for Tranformation* Team

This glossary is intended to explain some of the concepts addressed in *Inclusion for Transformation*. Some of these are presented together, in order to highlight the links between different ideas or, conversely, their differences. The explanations set out here are intended to assist the understanding of readers, and do not constitute scientific definitions. It should also be observed that some concepts are understood in a more particular or specific manner in certain articles. In this case, the authors concerned have expressed their point of view in detail.

ACTORS

In the interests of transformative inclusion, which is the specific subject of this work, we would consider it is important to specify and differentiate the persons and social groups involved in initiatives, in order to permit a systemic interpretation of power relationships at work and to classify their involvement.

The term **interested parties** describes institutions, organizations, communities, groups or individuals who have a direct or indirect interest in a given initiative, without necessarily being active participants therein.

In the vocabulary of public policies, particularly concerning development aid, **beneficiaries** are persons, communities, groups or organizations who fulfil the conditions required to support the organization of an initiative (a scheme, programme or project) for the improvement of their living conditions. This term is now attracting increasing criticism, as its semantic field refers to the principle whereby the persons affected by an initiative are perceived as the recipients of aid, in most cases of external origin, without actually assuming an active role in the promotion of the social changes envisaged.

The term **actors** and/or **stakeholders** encompasses a diverse range of persons and groups: civil society associations, public authorities and institutions, but also social enterprises on a local, national and international scale, not forgetting the communities affected by the project concerned and the people who make up these communities. Stakeholders play a critical role in the execution of an initiative, whether this is defined as a scheme, a public policy, a programme, a project, etc.. Although this definition highlights the capacity for action of each party and

GLOSSARY

establishes a dynamic of reciprocity, it nevertheless entails a risk of the blurring of systemic inequalities between the stakeholders to whom reference is made.

In this context, the term **community** describes a group of persons who share a common identity, constituted by shared standards and/or culture and/or values. The term community implies a sense of belonging to a social group, by reference to a certain number of criteria which, in some cases, may be cumulative. Communities define themselves, for example, by reference to issues of race, religion, gender, sexual and/or romantic orientation, health, age, class, etc.. Each individual may simultaneously be a member of a number of communities. This membership also varies over the course of a lifetime, and is sometimes a matter of personal choice, although this choice may also be removed, where membership of a community is defined at societal level. In French public debate, the concept of community is sometimes perceived in a pejorative light, whereas this concept is valued in French-speaking Quebec and in numerous societies throughout the world. In the present work, the term community is employed to describe persons affected by social changes, by way of distinction from the concept of a beneficiary. In practice, consideration is given to the ability to take the initiative, and to exercise agency. It should be borne in mind, however, that communities are not to be considered as uniform wholes, as the majority are permeated by inequalities. For example, a community of young people may include young women and young men of various social classes, sexual and romantic orientations, who may or may not be subject to racism, etc..

SYSTEMIC, CHANGE-ORIENTED AND INTERSECTIONAL GENDER APPROACHES

The concept of a **system** increasingly emerged in the wake of the Second World War, particularly through the work conducted at the University of Palo Alto in the USA by Gregory Bateson. The concept of a system, originally employed in biology, expanded progressively to encompass a variety of fields, particularly economics, psychology and sociology. In practice, it became evident to scientists that traditional approaches were no longer adequate for the analysis of complex phenomena, characterized by uncertainty and constant change. The systemic approach is thus based upon the concept of complexity, specifically as applied to the field of sociology by Edgar Morin in his work *The Method* (completed between 1977 and 1991).

The systemic approach is an interdisciplinary methodology which applies to the social field. Edgar Morin defines a system as "*a series of elements in dynamic interaction, organized in pursuit of a goal*". The systemic approach also involves the generation of models, the function of which is the analysis of series of mutually interdependent elements, from a dynamic perspective. Accordingly, the systemic approach constitutes a global process, whereby it is considered that a system cannot be reduced to the sum of its parts. For this reason, the systemic approach emphasizes relations between the various elements of a given system (rather than analyzing the structure of these elements).

The systemic approach considers objects under analysis in the context of their environment, their function and their mechanisms. The systemic approach may therefore investigate:

- the "purpose" of a system (or teleology);
- levels of organization;
- potential stable states;
- exchanges between parties;
- balancing and unbalancing factors;
- logic loops and associated dynamics, etc.

While the systemic approach has achieved distinction in human sciences, by the application of structuralist and functionalist approaches, it has also been reappropriated by scientists working in the materialist field, particularly in terms of perspectives for the analysis of power relationships.

The term **change-oriented approaches (COA)** describes a corpus of methods and tools inspired by theories of change. These highlight the qualitative impacts of initiatives for international solidarity, whilst taking account of the complexity of the systems within which these initiatives operate. These approaches involve the contribution of stakeholders, whether in planning, monitoring or evaluation. COAs encourage the various stakeholders to establish a positive and long-term shared vision. In an ideal version of COAs, each stakeholder then assumes a publicly visible commitment to a pathway of change (in terms of representations, attitudes, behaviours, practices, relations, etc.), in order to achieve a jointly-defined vision and conduct corresponding activities. Regular monitoring and evaluation are undertaken, in order to gauge the impacts of activities upon the changes pursued, and in the interests of the ongoing improvement of initiatives.

The concept of **gender** identifies the social construction of differences between males and females in a given society at a given time. This concept provides a grasp of social relations between individuals, including relationships of power and dominance, which may be deconstructed. The gender perspective encourages

GLOSSARY

the visualization and analysis of the social construction of gender, and thus of existing inequalities, not only between men, women and gender minorities, but also within each of the above-mentioned groups. The gender perspective is therefore necessary in order to combat gender-based inequalities.

The **intersectional gender approach** addresses the complexity of identities and social inequalities by the application of a systemic approach. Whenever the concept of gender interacts with other relationships of power based upon skin colour (perceived race), social class, caste, sexuality, age, disability, etc., reference is made to intersectionality. The intersectional gender approach argues against the hierarchical classification of these criteria for social differentiation. This approach considers the plural nature of oppressive systems, and takes account of their interactions in the generation of social inequalities.

INCLUSION

Commonly employed in the vocabulary of stakeholders in social change in English-speaking contexts, the concept of inclusion is adopted in a varying manner, according to the fields of expertise of civil society organizations, in France and internationally. In human sciences, deliberate reference is made to social inclusion, i.e. the position of individuals either outside or within larger systems of stakeholders. Initiatives which, ultimately, are aimed at the achievement of social transformation require the commitment of a variety of stakeholders: local, national and international civil society organizations, public authorities, etc.. The emergence of collective action and "working together" thus raises the issue of inclusion in a broader perspective.

In a paradoxical departure from its Latin derivation *inclusio* – meaning "imprisonment" – inclusion frequently involves the admission of persons to areas from which they were previously excluded. In the field of international solidarity, persons described as vulnerable or excluded are, in most cases, those affected by social changes. The concept of inclusion is sometimes criticized, on the grounds that it can be seen as perpetuating power relationships. A distinction is thus drawn between a central space (within which society is "made") and marginal spaces (which are presumed to be outside society). From this perspective,

inclusion is synonymous with the assimilation of the margins by the centre, thus implying the adoption by marginalized persons and communities of the standards and behaviours of the centre. Here, we propose a vision of inclusion which is described as "transformative". In this case, inclusion involves the expansion of decision-making forums to include individuals and communities who are affected by social change, at every stage in the conduct of initiatives. Transformative inclusion is thus intended to highlight the expression of marginalized voices, through the recognition of their specific features, on the basis of situated knowledge.

EMPOWERMENT AND THE REINFORCEMENT OF AGENCY

The term "empowerment", which describes the concept of the reinforcement of agency, has been employed since the 1970s in a variety of fields, including psychology, social action, health care, community schemes, etc.. Feminist movements in Latin America, India and Africa have progressively appropriated the concept of empowerment, which enjoyed increasing resonance in the 1980s. This concept also features strongly in initiatives involving marginalized communities in the USA: African Americans, women and the LGBTQI+ community. In this sense, empowerment is conceived as a process of transformation based upon the root knowledge of individuals and communities who are deprived of agency, or restricted in the exercise thereof, and who face a situation of dominance. Empowerment is defined as a process which involves the construction of new capacities for social change by combatting systemic inequalities.

Initially translated by French equivalents for the terms "capacitation" and "autonomy"", the term empowerment became increasingly widespread in the French-speaking world during the 1990s and 2000s. This phenomenon is associated with the emergence of a variety of practices which lay claim to empowerment, from projects for the self-reliance of local communities through to corporate management. International institutions have also appropriated this term, initially as an instrument for public development policies associated with gender, and subsequently as an integral element of agendas for combatting poverty. Numerous definitions of empowerment have emerged, thus blurring the clarity of its meaning, both in theory and in practice. In this context, it is increasingly associated with the reinforcement of economic capacities, with the progressive erasure of its social components. This is compounded by an emphasis upon individual choice and top-down logic, to the detriment of its original community dimension (associated with collective and root-based origins).

The multiple meanings and shifting sense of the word "empowerment" represent a challenge to stakeholders in social change (communities, social movements, civil

GLOSSARY

society organizations) with respect to the relevance of its use. While some parties have opted for the reappropriation of the term empowerment in its original sense, others, conversely, refer to the development or reinforcement of "agency". For this reason, both terms will be found side by side in the present work, according to the sensibilities of authors and the organizations to which they belong.

Above and beyond issues of vocabulary and translation, the reinforcement of agency and empowerment are understood here in their original sense. Accordingly, the reinforcement of agency and empowerment imply the increasing control by individuals and communities of their lives and of their potential for emancipation from systemic inequalities. Reinforcement of agency and empowerment describe a process for the construction of capacities for self-determination and action, in a psychological, social and economic sense. Reinforcement of agency or empowerment involve, firstly, personal and individual emancipation (for example, in terms of education, self-confidence, etc.) and, secondly, social and/or collective emancipation (for example, access to rights, material and cultural resources, etc.).

RACIALIZATION, TOKENISM AND SITUATED KNOWLEDGE

The terms **racialization** or **racialized person** were originally employed in human sciences for the analysis of racism as a social construction. A racialized person is a member of a minority group, who suffers from stigmatization, discrimination and abuse as a result of this membership. Minority groups or races are defined by combinations of characteristics: religion, skin colour, hair type, language, region or continent of origin, etc.. In this context, the term "racialized" is intended to distinguish the socially-constructed character of differences from the essence thereof. Thus, according to these terms, race is neither biological nor objective, but is a social construction which is employed for the representation, categorization and exclusion of individuals or communities. Racialized persons are now appropriating this term in order to differentiate themselves from persons described as "white" and dominant, i.e. who are not victims of racism.

Token is an English word for any emblematic item. **Tokenism** is a practice involving symbolic efforts for the inclusion of marginalized individuals or communities, in order to evade accusations of discrimination. For example, this term is used to describe a situation in which a person is recruited or assigned to a post for reasons associated with their personal characteristics, including gender, religious beliefs or racialization, rather than on the grounds of their skills and knowledge. This practice is generally presented as fair vis-à-vis the community of which the person concerned is a member but, in reality, is manipulated by organizations who wish to lay claim to inclusivity. Tokenism is also a term employed in psychology to describe situations in which the proportions between social groups are highly unequal. Persons in the least represented group are described as "tokens", and other persons as "dominant".

The concept of **situated knowledge** was developed by feminist researchers, specifically Donna Haraway, Sandra Harding and Patricia Hill Collins, from the late 1980 onwards. Feminist research work has shown that the socialization of researchers, together with their experience, shape their thinking and influence scientific production. Accordingly, any citation of scientific objectivity may, paradoxically, conceal the perpetuation of sexist, racist or class stereotypes, etc.. In this context, academic knowledge becomes both scientific and political, as these two terms are no longer in opposition. It is therefore up to each individual to identify their own "standpoint" and the influence of their own experiences upon the generation of knowledge.

From the intersectional gender perspective, Patricia Hill Collins has shown how black feminist sociologists occupy the particular role of "outsiders within" in the scientific community. They also find themselves at the point of intersection of various fields of socialization. Their viewpoint consequently represents a specific awareness, a situated knowledge which permits the emergence of new knowledge in the university environment. The issue of situated knowledge is also embraced by feminist organizations, who employ it as a lever for empowerment.

The concept of situated knowledge may be advantageously employed by stakeholders in social change, in an extremely wide variety of fields. This concept gives voice to those affected by initiatives: individuals, communities, marginalized persons, etc.. The use of situated knowledge can result in a radical change in the perception of a given initiative and improve its impact, as reflected by a number of articles and the postscript of the present work.

INTRODUCTION

The simplest way of defining inclusion is probably to describe it as the opposite of exclusion. Commonly employed in the vocabulary of actorss in social change in English-speaking contexts, the concept of inclusion is adopted in a varying manner, according to the fields of expertise of civil society organizations, in France and internationally. In human sciences, deliberate reference is made to social inclusion, i.e. the position of individuals either outside or within larger systems of actorss[1]. In a paradoxical departure from its Latin derivation *inclusio* – meaning "imprisonment" – inclusion frequently involves the admission of persons to areas from which they were previously excluded. In the field of international solidarity, persons described as vulnerable or excluded are, in most cases, those affected by social changes. Initiatives which, ultimately, are aimed at the achievement of social transformation require the commitment of a variety of **actorss: local, national and international civil society organizations, public authorities, etc.. The emergence of collective action and "working together" thus raises the issue of inclusion in a broader perspective.**

While the principle of the combined involvement of various actorss in common initiatives would appear to enjoy support, the adoption of inclusive process frequently proves to be an extremely complex exercise, which deserve particular attention. This gives rise to a series of questions: What do we understand by inclusion? Who is to be included? Why, and on what grounds? How is inclusion to be achieved? How is inclusion manifested in partnerships with local actorss? Where do we stand, in terms of the involvement of persons and communities affected by changes? What are the links between inclusion and empowerment? What are the points to be observed and inspirational practices? How is transformative inclusion to be incorporated in our practices? How is inclusion to be deployed and monitored over the full duration of an initiative: from planning through to evaluation, including arrangements for monitoring and deployment?

Far from attempting an exhaustive analysis of the issue of inclusion, this work highlights particular experiences, and encourages a dialogue between these experiences. Accordingly, the objective here is not to deliver "off-the-shelf" tools, nor the targeting of any exemplary approach, but to raise awareness and encourage consideration of the manner in which civil society organizations can address issues of inclusion, in the interests of transformation. For this reason, the visions of inclusion set out in this work are extremely diverse, and sometimes depart from the beaten track.

Getting to grips with *Inclusion for Transformation* is more a matter of exploration than the consultation of a guidebook. This collection provides access to a number of relevant approaches and methodologies, though articles which describe models and tools. Nor is *Inclusion for Transformation* a work for the pooling of "good practices" – a given practice is never exclusively "good" or exclusively "bad", and the reality in the field is frequently far more complex. The intention is rather to share the narrative experiences of actorss who have played the game, with substantial commitment, and to investigate their practices according to the proposed process for appraisal. For this reason, the articles in this work pay equal attention to successes, adaptations required and obstacles to initiatives. These narratives are a reflect of resilience and continuing prospects for transformation. Accordingly, this work can be considered from a perspective which is instructive to both authors and readers, which encourages personal reflection and inspires collective thinking.

While each article constitutes an independent whole, it is worth highlighting the links between them. *Inclusion for Transformation* can thus be investigated by following three different strands, according to the focus of interest of the readers concerned.

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1. The concept of social inclusion was highlighted by sociologist Niklas Luhmann (1927-1998). It is defined as the opposite of exclusion, and refers to the role of individuals within larger social systems. A commitment to inclusion involves a variety of fields, specifically those covered by Economic, Social and Cultural Rights (ESCR).

INTRODUCTION

Methodological strand. This involves a selection of articles describing reflections and feedback from the implementation of tools associated with inclusion, from planning to evaluation, and including the issue of empowerment.

Inspirational experience strand. Articles under this heading are the experiential narratives of practitioners, who undertake an objective analysis of their practices in the field of transformative inclusion and empowerment.

Thematic strand. This strand on the theme of inclusion follows an alternating sequence of articles dedicated to methodologies and inspirational experiences, in three phases:
• First part: Who is to be included?
• Second part: In pursuit of a community-based approach.
• Third part: Empowerment, viewed through the gender lens.

The first part of this work is comprised of articles which respond to the question: Who is to be included? Inclusion is described herein as an opportunity to change perspectives and challenge stances adopted. These articles include a discussion of issues associated with participation, and address the reciprocal relations involved in partnerships, whilst also providing an invitation to reconsider the role of all actorss involved in support work.

In *Measuring Stakeholder's Engagement: A Practical Approach*, Anh Thu Hoang and William Pate describe the positive impacts of the inclusion of actorss in initiatives, whether locally or internationally. The authors identify simple and adaptable tools which permit the definition of objectives for the involvement of actorss. More specifically, they argue in favour of the inclusion of the persons concerned, commonly described as beneficiaries, throughout the project life cycle, from planning through to *ex-post* evaluation.

Yannick Billard, of the association "Pays de Savoie Solidaires", which works for the Department of Savoie in France, is co-author of an arti-

cle with Serigné Mapathé Samb, from the Department of Bignona in Senegal. They describe their method of "crossed views" for the consideration of persons living with a disability. Inclusion is addressed here from the perspective of the pooling and communication of practices between the two territories. This article highlights the benefits of a stance of reciprocal cooperation in relations between partners. Inclusion is conceived here as "acting together".

Charlemagne Bio, from the NGO "Aide et Action", challenges monitoring and evaluation methodologies which do not take sufficient account of changes experienced by "support staff", i.e. the staff teams of civil society organizations, both in France and internationally. Analysis of indicators of change considered in conjunction with an education programme associated with the constitution of collective knowledge, indicates that this support staff is not included among the actorss targeted. However, the progressive development of their support policies, together with the enhancement of know-how, are regularly cited as unexpected consequences. Civil society organizations are therefore called upon to join the circle of actorss who are involved in, and affected by the changes sought. In this case, inclusion represents an invitation to self-observation.

The second part of the work is devoted to the role of communities in inclusion processes. It describes how communities have been invited to participate in action-research processes, and/or to monitor the experience of a community-based approach in relation to actual conditions in the field.

Vincent Henin and Paula Uglione, of Louvain Cooperation, address the issue of empowerment through the Environmental Integration Tool-based approach. This methodology is described as an "invitation to dialogue" between, on the one hand, Louvain Cooperation and, on the other, supported entrepreneurs in the agricultural sector, in the interests of the more effective reconciliation of economic and environmental issues. This approach is thus established as a tool which connects entrepreneurs with their ecosystem at every stage of an initiative: diagnostic analysis, definition, monitoring and evaluation. Inclusion is conceived here as the involvement of users.

Florian Perrudin, of the Essentiel association, takes our readers on a journey to the Republic of Guinea. This article describes, in fine detail, the complexity associated with the engagement of action in the field of community health care. We thus follow the association's own

INTRODUCTION

questionings of the "balancing act" which it undertakes between the observation of working principles in communities and the consideration of constraints associated with the deployment of projects. This article also encourages a greater dialogue with public authorities, in the interests of promoting community-based schemes. Inclusion is considered here from the perspective of collective participation.

The French Agricultural Research Centre for International Development (CIRAD) has provided a collectively drafted article, coordinated by Emeline Hassenforder. This article sets out a methodology and tools which are intended to secure the inclusion of women and young people, from the planning stage onwards, and throughout the monitoring and evaluation of an agricultural programme in rural areas of Tunisia. Through this narrative on its action-research initiative, CIRAD sheds light on the manner in which international and local organizations can adopt an inclusive stance, which involves young people and women, whilst taking account of their particular characteristics.

The third part encourages the observation of existing links between inclusion, gender, intersectionality and empowerment. Over and above issues associated with the representation or "targeting" of women initiatives, the question arises of how genuinely empowering spaces are to be created. How are specific factors in the situations of women and/or gender minorities to be considered? How does this influence initiatives? These questions are addressed through experiences in the field and the modelling of empowerment processes, together with the consideration of the role of evaluators in the dynamics of social change.

Klàra Hellebrandovà and Arnaud Laaban share their experiences as evaluators, describe methodological tools and argue in favour of empowerment as an approach to social change. This article addresses, in a detailed manner, issues of exclusion, vulnerability and disempowerment, through an intersectional interpretation of power relationships. It thus sheds light upon certain blind spots in the conception and evaluation of international solidarity projects. It also casts a critical eye on the manner in which effectiveness is perceived by funders. Finally, it

shows how the inclusion of communities, simultaneously incorporating the situated knowledge of persons and collective action, constitutes a cornerstone of equitable and sustainable social change.

Laure Turchet and Louise Lacoste analyse the pathway followed by the "Carton Plein" French association in order to promote the inclusion of homeless women, through the "First hours" device for re-integration through employment. They set out their interpretation of the support of women and gender minorities, which takes account of the sexism and sexual abuse to which they are subject. Over and above a quota system, and the requisite access of women to this device, they describe the construction – still in progress – of a "safe space" as a driver for empowerment. In this case, inclusion takes the form of cooperation between supported persons, trainers and management, with the intention that sexism should cease to be routine.

Sarahi Gutierrez describes the learning process of the NGO Batik International for the integration of gender in its initiatives. She warns against the blind spots associated with gender inclusion based upon the individual promotion of women, and describes the necessity for the consideration of their environment. This article traces the path followed by Batik and its network of partners for the collective conception of a new and more systemic vision for the inclusion of women, in which change is synonymous with collective empowerment.

In *Transformative Evaluation for Lasting and Just Social Change*, Tamarah Moss and Donna Mertens invite evaluators to consider themselves as agents of change, working for the promotion of social and ecological justice. They propose an intersectional analysis of power relationships, particularly with respect to racism. The authors identify the inclusion of marginalized persons as an indispensable condition for an evaluation which, it itself, is transformative. Far removed from the symbolic representation of marginalized persons, this article advocates a process of evaluation which is inspired by community initiatives for the promotion of social justice.

To round off this work, the editorial committee has produced a postscript. This sets out recommendations, together with five key factors which are conducive to the adoption of inclusive and transformative processes. The postscript thus describes prospects for the enrichment and expansion of inclusive approaches and methodologies, in the interests of social and ecological change.

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WHO TO INCLUDE?

The first part of this book brings together articles that answer the question: Who to include? Inclusion is described as an invitation to change one's perspective and to question one's own posture. It includes a discussion of the challenges of participation, reciprocal partnership relations, and an invitation to reconsider the place of all stakeholders in support missions.

MEASURING STAKEHOLDER ENGAGEMENT : A PRACTICAL APPROACH

ANH THU HOANG AND WILLIAM PATE

Stakeholder engagement, on the surface, is a deceptively simple concept – the degree to which stakeholders are engaged in a project, be it a domestic project, an international development intervention, a patient – centered research project, or product marketing in business. Donors, funders, non-profits, and businesses understand the need for stakeholder engagement1. After all, those who have a stake in these engagement activities have a vested interest (by definition) in the outcome.

Interestingly, beneficiaries, "the target groups whose well-being the intervention intends to improve," have often been excluded from consultations with other key stakeholders to design and implement these interventions[2]. Logic models and theories of change almost always give at least nominal acknowledgement to the existence of stakeholders. How many of us practitioners (e.g., evaluators, civil society and public policy makers) have been in a project kickoff meeting where the hired consultant informs "key stakeholders" of the scheduled logic model activities built upon the funders' requirements? Is stakeholder engagement merely informing a select group of representatives of a plan that was developed without their input, and at a single meeting? Can it be more than this? Should it be more than this?

How stakeholder engagement is conceptualized affects the spectrum of stakeholder engagement itself. So being clear on the purpose of stakeholder engagement is

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1. From our perspective community participation is a form of stakeholder engagement.
2. John Mayne's definition of beneficiaries (2015); since the term has a negative connotation as being submissive, powerless, etc., in this chapter we use the term stakeholders to also include beneficiaries

helpful to its operationalization. Just like the existence of varied definitions of stakeholder engagement there are also different levels of engagement from tokenism to intentional, planned stakeholder engagement that is empowering to beneficiaries or non-traditional stakeholders. Purpose drives how engagement is operationalized; in Yemen a project developed a stakeholder engagement plan (SEP) setting aside a budget for efforts to facilitate non-traditional stakeholders; for example, vulnerable women and youth to participate in the project (UNICEF *et al*. 2020).

We, like many before us, believe there is a better way. Researchers have demonstrated the importance of quality stakeholder engagement in achieving better outcomes in a variety of fields (Rifkin *et al.*, 2000; Brownlee *et al.*, 2017). Practitioners in these diverse settings (e.g., monitoring and evaluation, domestic program evaluation, health care, business) intuitively understand the value of active participation of end-users as well.

> **If end-users or beneficiaries have true buy-in and actively participate in the program, they become empowered change makers; a worthy focus of this book.**

The goal of this chapter is to illustrate practical ways of measuring meaningful stakeholder engagement. By deliberately working through this process, we believe that meaningful stakeholder engagement is both possible and achievable, leading to better outcomes and to empowerment of those stakeholders previously thought of as just beneficiaries.

Stakeholder engagement leads to outcomes and empowerment

It is somewhat intuitive to understand that better stakeholder engagement leads to better outcomes. As obvious as this statement may be, it is less clear what constitutes "better" stakeholder engagement, especially when the specific context can be so incredibly varied: domestic program evaluation, monitoring and evaluation of international programs, patient research, and business. When people talk about stakeholder engagement they usually mean inclusion of stakeholders other than those who are directly impacted by interventions. Just because programs are human-centered, and have aims to improve beneficiary populations' social conditions, they do not necessarily translate to mutual respect, learning, and empowerment.

In our professional experiences as evaluators, we have learned that stakeholder engagement, when utilized, is an important process that can lead to both better intervention design, results, and empowerment. That is, among the various

MEASURING STAKEHOLDER ENGAGEMENT : A PRACTICAL APPROACH

purposes and uses of stakeholder engagement, the focus of this chapter is the pathway from stakeholder engagement to outcomes to empowerment. The examples we discuss here include contribution analysis; diversity, equity, and inclusion training (DEI; e.g., Zugelder & Champagne, 2018); and systems perspective. As described elsewhere in the literature (e.g., Weiss, 1998), the latter two examples come to us from other disciplines.

Contribution analysis.

The aim of contribution analysis or contribution mapping (Kok *et al.*, 2016; Mayne, 2017) is to determine how project or research processes unfold and how these program elements (e.g., stakeholders, activities) contribute to program action and outcomes. This is often done after the fact with targeted interviews of funders, those who actively participated in the program implementation, evaluators; and review/analysis of program documentation. The identification of key individuals or situations give rise to understanding what specific individuals or actions lead to greater outcomes. Analyses like this help to connect the dots between what was planned and the actual outcomes. In a study conducted by Kok and others (2016), **key factors that contributed to the use of research were, among other things, stakeholders that initiated and led the projects; that is, involvement of stakeholders in a significant capacity from the start.**

Diversity, equity, and inclusion (DEI) training.

The primary goal of DEI training initiatives is equitable representation at all levels in the workplace along the lines of race/ethnicity, gender, and other characteristics. These efforts are designed to identify and remove barriers to employment opportunities and ensure equal treatment of employees by the organization.

> **Stakeholder engagement in this environment means ensuring that employees at all levels of the organization and from any background have a voice in decision making.**

True inclusion means much more than token representation. This training is not a routine activity or tool used by evaluators. In the United States at least, this training is conducted by consultants or trainers in the corporate world.

Systems perspective.

A systems perspective addresses the concept of stakeholder engagement in at least two ways. First, systems thinking gets us away from a strictly linear process suggested by traditional logic models; namely, where stakeholder engagement is represented as an input that occurs only at the very beginning of the process. This static view is limiting in that most activities are almost never this simple or linear; monitoring and evaluation activities, community interventions, patient-centered research, and product marketing efforts often include iterative and sometimes competing processes (Senge, 2006). In the real world, stakeholder engagement is a multi-dimensional effort occurring throughout the project lifecycle.

> **Second, systems thinking intimately involves shared vision and team learning, activities which leverage the insights and capacities of all team members.**

In this view, individuals on the lower hierarchy have an important contribution to the organization as a whole. By engaging their perspectives and abilities, the organization can achieve greater outcomes.

Meaningful stakeholder engagement can be measured

There is a gulf between academic and practitioner communities in terms of stakeholder engagement interventions. An over-emphasis on internal validity by academics results in a trade-off of reduced utility of the evaluation for the practitioner. This approach, the practitioner perspective, better reflects stakeholders' evaluation views and concerns, makes external validity workable, and becomes therefore a preferable alternative for evaluation of health promotion/social betterment programs. The integrative validity model and the bottom-up approach enable evaluators to meet scientific and practical requirements, facilitate in advancing external validity, and gain a new perspective on methods. The new perspective also furnishes a balanced view of credible evidence, and offers an alternative perspective for funding.

The need for measuring stakeholder engagement has been voiced previously. Ray and Miller (2017), physician researchers at the University of Pittsburgh School of Medicine, recently articulated a framework for planning, evaluating, and reporting stakeholder engagement with the goal of improving both the quality of research outcomes and our understanding of this engagement. That is, both our understanding of the process and the fruits of these projects are improved. This

MEASURING STAKEHOLDER ENGAGEMENT : A PRACTICAL APPROACH

approach has been successfully implemented in public health efforts by others (e.g., Archana *et al.*, 2019).

We propose an approach that is neither grass-roots nor top-down. Working from either perspective forces a false dichotomy. It's not either-or, especially if we consider beneficiaries on the same level as other stakeholders. Rather, inclusiveness in this case means also; greater/more meaningful contributions to one or more elements of a program cycle. To this end, we propose measuring stakeholder engagement along two dimensions: principles and phases.

Deliberate Stakeholder Engagement Principles - One Dimension of Measurement

We will discuss our approach by starting with a set of seven principles governing all components of planning for and operationalizing stakeholder engagement (Schrandt, 2014). Our hope is that funders/donors weave these principles into future Request For Proposals (RFPs) to facilitate deliberate stakeholder engagement and the principles as proxies for Deliberate Stakeholder Engagement (DSE) are monitored and evaluated. That is, this information is assessed for the improvement of processes (evaluation utilization; Weiss, 1967, 1998) or its relative contribution to outcomes (contribution analysis). This dimension of measurement forces an examination of stakeholder engagement quality in each of the four program phases covered in this chapter.

1. Inclusion/Respect. In recognition of different roles and responsibilities of each stakeholder, it follows that the respective contributions are appreciated. Inclusiveness of beneficiary stakeholders may represent unique cultural diversity and/or disabilities requiring accommodations for their participation.

2. Transparency. Practitioners need to define roles and responsibilities for each stakeholder prior to engagement; their refinement should also be agreed upon as a group. There is an apparent recognition that each provides unique and valuable contributions to planning, implementation, evaluation, and decision-making processes.

3. Co-learning. Likewise, practitioners need to develop plans to ensure beneficiary-partners understand the engagement process and that all stakeholders understand and apply engagement principles.

4. Alignment. Alignment occurs when the activities or efforts of two or more individuals are complementary and working together harmoniously (Senge, 2006). This "getting on the same page" allows the efforts of individuals to transform into higher order outcomes of the group or team.

5. Equity. This principle refers to fairness in treatment or participation. In the context of stakeholder engagement, this means treating all participants as equals even though they may have varying levels of status, resources, or opportunities.

6. Do no harm. Similar to DNH principles in the humanitarian field and with the Hippocratic oath in the medical field, this principle is designed to safeguard the beneficiaries, clients, or end-users of a particular intervention.

7. Deliberative stakeholder engagement as an outcome. Deliberative stakeholder engagement ideally is not limited to the beginning of a project or program. When included as an outcome, stakeholder engagement is transformed into an interactive process that occurs at multiple timepoints (or continuously) throughout the lifecycle of the project or program. By explicitly defining it as an outcome, activities and their consequential outputs are assessed throughout the project so that improvements can be made in the subsequent iterations, so that the causal influence of degree of engagement on other outcomes can be illuminated, etc.

To better illustrate these principles, the following example considers and incorporates beneficiary inputs into the program design and implementation for a typical Request for Proposal (RFP).

AN EXAMPLE. In Phase 1, developing the program design, deliberative stakeholder engagement would include direct dialogue with beneficiaries in identifying priorities/needs and potential solutions. The use of *dialogue* is intentional as it is a two-way, inclusive activity (Senge, 2006) that fulfils principles of *inclusion/respect* and *equity* rather than the usual description of *informing*, or *notifying*; lesser, one-way activities.

MEASURING STAKEHOLDER ENGAGEMENT :
A PRACTICAL APPROACH

In Phase 2, conceptualizing the Theories of Change and results framework (e.g., using the Monitoring Evaluation Learning Plan Development process), beneficiaries' perceptions of development needs and problems and positive results may or may not be the same as donors. Involving beneficiaries in defining and refining the scope of the project is a practical initial co-creation process whereby subsequent strategies are developed. This is an important step to support building towards shared commitment and thus *alignment* before developing indices and metrics for monitoring and evaluation.

In Phase 3, monitoring the program (i.e., during implementation), stakeholders share progress/inputs/feedback concerning implementation thus far. Deliberative stakeholder engagement during implementation allows for *co-learning*, adaptations to changes in context or other factors, as a function of reality.
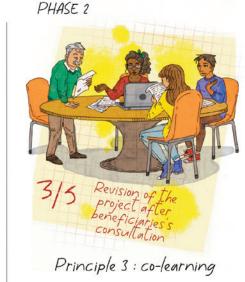
In Phase 4, evaluation, deliberative stakeholder engagement could be achieved through dialogue with all stakeholders, to include beneficiaries with the goal of understanding perceived benefits (which ones, and to what degree) of program outcomes were to various stakeholder groups, lessons learned, and suggestions for improvements in the next iteration.

Deliberate Stakeholder Engagement (DSE) Indices/Examples

We recognize that deliberate stakeholder engagement implementation may not be possible equally for all programs/projects. However, we also know that it is easier to not change the ways things are done, in other words, do what we always do because program evaluations almost always tell us that there are positive results. Many of us also know that more can be accomplished with deliberate stakeholder engagement in some form or shape. One example of what deliberate stakeholders engagement may look like has already been given above. We propose the following as additional indices of measurements for DSE.

PHASE 1 — 1/5 — No inclusion at all, only men !
Principle 1 : inclusion and respect

PHASE 2 — 3/5 — Revision of the project after beneficiaries's consultation
Principle 3 : co-learning

PHASE 3 — 4/5 — Regular contact with beneficiaries throughout the project
Principle 4 : alignment

PHASE 4 — 1/5 — Lack of inclusion
Principle 5 : equity

Inclusion of stakeholders : 7 principles to evaluate at each phase of the project

MEASURING STAKEHOLDER ENGAGEMENT : A PRACTICAL APPROACH

Equity in representation of beneficiary groups

Rationale. The purpose here is intentional, deliberate, and *transparent* engagement regarding processes.

EXAMPLE 2. As part of developing program design (Phase 1), descriptions (criteria of selection) of desired beneficiary group representatives prior to inviting them for deliberate stakeholder engagement; also include how they were "selected" and who actually showed up. Attention to how beneficiary representatives are selected and who ultimately gets to participate in deliberate stakeholder engagement is obviously important. Often youth, women, girls, especially those in the most inaccessible places are left out. In the evaluation process (Phase 4), the degree to which beneficiary groups are included in earlier phases can be evaluated as an outcome. That is, did these groups have decision making power similar to funders or evaluators? Did they experience *co-learning* throughout the project lifecycle?

Accommodation of different capacities and disabilities in deliberate stakeholder engagement

Rationale. Consideration of approaches necessary to accommodate unique capacities and disabilities of individuals/groups in deliberate stakeholder engagement activities. The purpose is deliberate *inclusion/respect* and *equity*.

EXAMPLE 3. With regard to **conceptualizing the Theories Of Change and the Results Framework** (Phase 2), intentional inclusion of representatives from underserved groups for the conceptualization is a rare event. Although this inclusion of more individuals is expected to slow down the process, doing so has long been regarded as perhaps resulting in more relevant and better outcomes (Weiss, 1995).

Do No Harm is operationalized throughout the program/project cycle

Rationale. The purpose is to avoid unintentionally further perpetualizing discriminatory and stigmatizing practices that marginalize any groups or population based on gender, disability, race, or other characteristics.

EXAMPLE 4. Engagement with non-traditional stakeholders like urban at-risk youths or indigenous women at intervals such as design (Phase 2), implementation/monitoring (Phase 3), and evaluation (Phase 4) can only support principles of do no harm since their unique perspectives are represented and shared with program stakeholders. Their continued involvement ensures that this principle of *do no harm* is active, collaborative, and ultimately transformational.

These are but four brief examples of how Deliberative Stakeholder Engagement can be identified and measured. The proposed matrix, as a planning tool, can help the practitioner identify where Deliberative Stakeholder Engagement has been enacted but, more importantly, where Deliberative Stakeholder Engagement has yet to be articulated. Completely filling the matrix may not be possible or even desirable for any one specific project or implemented program. However, this basic system of measurement does give clarity on how well we may have done at the conclusion of a project. Used in earlier stages, even greater levels of engagement are possible.

Levels of Engagement within a Program Cycle - Another Dimension of Measurement

There are many ways to measure stakeholder engagement. We propose a basic method that is useful to practitioners. This is not an attempt to develop a lab-tested instrument with a scientifically acceptable reliability index. Rather, this chapter is meant to be a starting point in considering the various and wide-ranging dimensions of stakeholder engagement that are possible so that the practitioner can consider their application to the project at hand. Ideally, these considerations are made well before the initiation of the project or program. But, experienced practitioners recognize this is not the usual case. Even if the project is well underway and many options are beyond change, there is still hope for strategically targeted adjustments.

At each phase of the program cycle are occasions where stakeholder engagements can occur. And at each phase, the seven principles of *Inclusion/Respect, Transparency, Co-learning, Alignment, Equity, Do no harm*, and DSE as an outcome can be assessed to gauge deliberate engagement. The following are a few key questions to ask ourselves through the program cycle. They are neither complete, nor exhaustive; rather, they are designed to get us thinking about how the principles may be applied.

MEASURING STAKEHOLDER ENGAGEMENT : A PRACTICAL APPROACH

Beyond inclusion and representation, how were members of beneficiary populations selected in the activity?

What were the efforts to facilitate the inclusion of the most marginalized/underrepresented stakeholders in the engagement activities?

Are engagement approaches to obtain inputs and discuss priorities, solutions etc.. accommodating to different communication styles and capacities?

Are program components an integration of all stakeholder priorities and needs and aligned with those who are most affected by the program?

Phase 1: Developing Program Design. If beneficiaries are not consulted during the conceptual stage of the program, then already the key design elements, and assumptions may be misguided. Thus, donors and others interested in doing "good" need to understand the priorities in the communities and common interests and goals to address (some of) the issues. Without direct dialogues/consultations, funders and other stakeholders miss opportunities to listen first before taking action (develop the requests for proposals).

Phase 2: Conceptualizing the Theories of change and the Results Framework. In developing a Monitoring, Evaluation, and Learning Plan (MELP), inclusion of beneficiaries inputs in development of metrics and indicators is foundational to measuring what matters and may contribute to program sustainability. How different stakeholders view the problem and how it can be resolved may be different from the perspectives of other stakeholders, including funders. It is obvious that getting beneficiaries' inputs in intervention design can make program activities more appropriate and perhaps more effective in the long term, or even sustainable. Defining the problem, anticipated changes, and metrics of progress/success can be tasks where beneficiaries can add depth and unanticipated dimensions to such measurements.

Phase 3: Monitoring Program. It makes sense to include representatives of target communities in tracking implementation as they live in the locality of the program. They play invaluable roles in interpreting outcomes **embedded in the socio-cultural milieu**; so, for both performance and context monitoring. Dialogue with all stakeholders including beneficiaries makes sense in that it provides on-going opportunities to exchange implementation results, challenges, and make necessary changes along the way. This is practical; to adapt to anticipated and unanticipated complexities in the context.

Phase 4: Evaluation. Undertaking any kind of evaluation is an investment regardless of resources spent on the activity. Evaluation utilization is no longer a novelty. That is, with ever increasing competition for limited resources available for programs, evaluation utilization is rapidly becoming necessary. However, we argue that there is still more investment in getting the "numbers" or quantification of problems for legitimacy; we mentioned previously the preoccupation with external validity in evaluation compared to internal validity.

We strongly suggest stakeholder engagement processes throughout the program cycle as opportunities to document and strengthen internal validity as well as make evaluation results more usable. We caution in considering evaluation *utilization* as program *replicability*; that is taking the program out of its context and expanding to other contexts.

Bringing Principles and Phases Together

The table below brings our two dimensions of measurement together to create a matrix. This gives us a mechanism by which a practitioner can walk through the design/logic of their program/project for indicators of meaningful stakeholder engagement. Each cell in the table represents an opportunity for deliberative stakeholder engagement. However, not every combination of principles and phases will work for every program/project. Further, additional or different principles or even project phases may be necessary to customize this approach for the program/project at hand. It is up to the individual practitioner to use their best judgement in the application of this approach for their particular situation.

The table can be used in a number of ways. It may be sufficient to use the intersection of principles and phases to qualitatively identify opportunities for deliberative stakeholder engagement. That is, if the principle of equity in representation of beneficiary groups is an important goal for your project, the table can be used to help identify for which of the four phases this principle is addressed. In our Example 2, this principle is described for Phases 1 and 4. It may be worthwhile during the design phase of the project to identify opportunities for this principle in Phases 2 and 3.

MEASURING STAKEHOLDER ENGAGEMENT : A PRACTICAL APPROACH

Another way to use the table goes a little further. Rather than qualitatively identifying which intersections of principles and phases exist for the project at hand, one might insert a rating of some kind (e.g., on a scale of 1 to 5, with 5 being highest) for how well that particular intersection of principle and phase is addressed. For Example 3, we described the intentional inclusion of representatives from underserved groups in the conceptualization of Theories of Change and the Results Framework. If this inclusion is nominal and these representatives have little say in the design, then we might give a rating of "1" for the intersection of *inclusion* (principle) and Phase 2. However, if these representatives fully participate in the design of the project and are treated as equals on input, then we might give a rating of "5" for both principles of *inclusion* and *equity* under Phase 2. In this way, we capture a quantitative measure of deliberative stakeholder engagement that can be used as a benchmark for subsequent iterations of the project or for future projects down the road. In this sense, the rating is akin to a measure of implementation fidelity.

The pursuit of meaningful stakeholder engagement is possible

Numerous examples exist in both the academic and grey literature of meaningful stakeholder engagement.

> Rather than bemoaning the impossibility of achieving perfect implementation as justification for the mundane, we urge practitioners everywhere to consider the many opportunities for true impact (both in terms of outcomes and empowerment) that result from stakeholder engagement not only throughout the lifecycle of a single project, but also over the course of many projects in a given context (Greenhalgh & Fahy, 2015).

Further, funders and donors in particular should put in the Requests for Proposal stakeholder engagement as a necessary pillar of program design and organizations can plan for its inclusion at multiple points throughout a project lifecycle by developing a Stakeholder Engagement plan. The incorporation of stakeholder engagement is not only a useful activity but yields positive outcomes and can address social inequities.

PRINCIPLES	PROJECT PHASE			
	1	2	3	4
INCLUSION/RESPECT				
TRANSPARENCY				
CO-LEARNING				
ALIGNMENT				
EQUITY				
DO NO HARM				
DSE AS AN OUTCOME				

MEASURING STAKEHOLDER ENGAGEMENT :
A PRACTICAL APPROACH

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POSTSCRIPT
BY THE EDITORIAL COMMITTEE : WORKING TOWARDS TRANSFORMATIVE INCLUSION

The Editorial Committee of *Inclusion for Transformation* is made up of practitioners from various backgrounds: international or local solidarity organizations, thinktanks, universities and consultants. We have worked throughout 2021 on the production of this book. Our initial exchanges focused on the issues and assumptions involved in the present work. Some of us have assumed the role of keynote speaker at workshop meetings with contributors, before committing ourselves to the structuring of this publication. We have taken this opportunity to share our thoughts and recommendations, born of our individual experiences and the collective journey associated with *Inclusion for Transformation*. Ultimately, **this book is an invitation to stakeholders working for the promotion of social change, both in France and internationally, to grasp the issues involved in transformative inclusion and deploy initiatives for individual and collective empowerment.**

The issue of inclusion raises an initial challenge: the perception and combatting of inequalities. A number of articles in this work refer to the framework of Sustainable Development Goals and the principle of "Leave no-one behind", to be achieved by the year 2030. Any response to this issue presumes that **inclusion will be conceived from the viewpoint of the persons concerned and their communities, in order to allow their systematic involvement in changes.** Civil society organizations will also need to adopt a keener perspective for the consideration of the role of communities in larger systems of stakeholders (non-governmental organizations, public authorities, economic stakeholders, etc.). In other words, it is essential, in our view, to undertake an interpretation of power relationships between stakeholders, in order to raise awareness and, ultimately, reduce inequalities. Systemic analysis is also required to permit the identification of inequalities which exist within communities themselves. **We thus consider it important to move beyond the scope of conventional tools for counselling or community support, and adopt an**

intersectional gender lens. This will allow us to identify inequalities in practice, whether associated with gender, skin colour, social class, age, state of health, etc.

In order to achieve this, it is not sufficient to pay particular attention to the presence and the symbolic representation of different communities. It is up to civil society organizations to query their own role in supporting these communities, and to work for the emergence of "power with"1. The situation of these organizations is paradoxical, which places them in a delicate position. Their declared aim is to support communities for the achievement of greater independence, and the promotion of empowerment. However, the persons affected by these changes are frequently considered as beneficiaries, recipients of aid and/or assistance for the enhancement of their capacities.

In many cases, this tension between internal power and external power is difficult to resolve for civil society organizations. They are torn between, on the one hand, the promotion of values and objectives for emancipation and, on the other, the reality of conditions in the field and numerous obstacles, compounded by the concerns associated with the reporting of their results to public authorities and/or donors. In doing so, they regularly forego precious input from the persons concerned and their communities. However, these contributions from the persons concerned are a necessary resource for combatting inequalities and promoting social justice. Communities have a legitimate voice *per se*, which deserves to be heard. This is an ethical stance, which is consistent with the rights-based approach2 promoted by civil society. Moreover, communities have a wealth of situated knowledge, i.e. knowledge born of the experience and life histories of the persons concerned. As the persons concerned embody an experience of inequalities which we can only imagine, their voices represent an expression of detailed contextual knowledge. Situated knowledge contributes to the ongoing improvement of initiatives, making them more relevant, more effective, more efficient,

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1. Popular education and feminist movements distinguish between "power over", "power to" and "power with". The concept of power traditionally refers to dominance and "power over", which describes the capacity for decision-making, and for the exercise of action "over" persons, sometimes at the expense of their own will. "Power to" acknowledges the capability of each individual to assume the role of stakeholder in change, including marginalized persons. This term highlights capacities for individual emancipation. "Power with" describes involvement in a collective initiative for the promotion of social change.
2. The human rights-based approach refers to international frameworks defined in this field (for human, economic, social and cultural rights, etc.). This approach is intended to combat inequalities, discrimination and, more generally, the power relationships which baulk social change for the persons who live under these relationships.

POSTSCRIPT
BY THE EDITORIAL COMMITTEE :
WORKING TOWARDS
TRANSFORMATIVE INCLUSION

more coherent and more sustainable. Communities are thus endowed with inestimable resources, and it is up to civil society organizations to support and encourage their expression.

Oncecivil society organizations have reached agreement on the necessity for taking into the consideration of the diverse voices of communities, their position and their approach to support communities will need to change. **If it is to be transformative, inclusion must be accompanied by individual and collective empowerment.** In this regard, we would emphasize the necessity for interaction between individual and collective empowerment. While individual empowerment is a prerequisite for the involvement of persons in collective initiatives, it does not, in itself, constitute a substitute for this involvement. In practice, collective mobilization allows communities to be heard and consulted in multi-stakeholder systems, within which power relationships do not work in their favour. The empowerment of communities, for civil society organizations, specifically involves the foregoing by the latter of their position as experts, and the assumption of a facilitating role. The intention is to move as far away as possible from any prescriptive approach to change, by emphasizing the sharing of knowledge which is present within groups. In our view, collective intelligence is also considerably enhanced where it is associated with care skills, i.e. a series of skills whereby attention is paid to each individual, for the promotion of collective wellbeing.

This use of collective intelligence in favour of a shared vision is a founding principle of theories of change. Any change of stance by civil society organizations in this direction is frequently driven by an intent to construct of reciprocal spaces between the latter and communities. This requires each party to assume a role in shared concerns. In its ideal form, however, reciprocity presumes a situation of equality, which cannot be dictated. The identification of phenomena of exclusion and inequalities in empowerment call for a change in the stance of civil society organizations vis-à-vis partners and communities. Inspired by numerous academic works and civil society initiatives in the field of gender, **we invite civil society organizations, particularly in the "north", to assume a collaborative role with communities. Their function will be to echo – and possibly amplify – the voices of the persons concerned.** We would also consider it important that practical consideration should be given to the contribution of civil society organizations to the elimination of obstacles which restrict the empowerment of communities.

We have observed that approaches to deliver transformative inclusion are, as yet, insufficiently reflected in the tools which are employed to support the transition to action. We would recommend, firstly, the adaptation of existing methods; secondly, "pilot" methodological tools should be created, which might be trialled, improved and capitalized upon. We have identified five key factors which constitute levers for empowerment, and which are set out below.

This change in the stance of civil society organizations is no easy matter, neither internationally nor in a number of national contexts. It involves the mobilization of human resources and a commitment to learning processes. Organizations working with communities cannot bear sole responsibility. Solutions must be developed as part of a multi-stakeholder dynamic, through the construction of a shared vision, in which organizations are supported by public authorities and donors. impliquant, à leurs côtés, les pouvoirs publics et les bailleurs.

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Five key factors for the promotion of transformative inclusion and empowerment

ANALYSIS OF INEQUALITIES IN EMPOWERMENT ON AN INDIVIDUAL AND COLLECTIVE SCALE, BEFORE, DURING AND AFTER INITIATIVES
- Involve the persons concerned and their communities in analysis, as part of an approach of cooperative dialogue.
- Map stakeholders, incorporating dynamics of exclusion, influencing capabilities, contextual knowledge and community resources.
- Clarification of inequalities in empowerment, viewed through an intersectional gender lens.
- Identify obstacles to individual and collective empowerment, and of barriers to be eliminated.

INTEGRATION OF TRANSFORMATIVE INCLUSION IN THE DEFINITION, MONITORING AND EVALUATION OF CHANGE
- Integrate community empowerment in the vision of change.
- Propose and model monitoring and evaluation indicators for empowerment which can be adapted to changes sought and the contexts concerned.
- Integrate data collected during project implementation with the ongoing improvement of initiatives.

PROMOTION OF COMMUNITY EMPOWERMENT AS A CORE ELEMENT OF INITIATIVES
- Promote a high-quality standard, combining an ethical stance with the ongoing improvement of impacts.
- Consider communities as core stakeholders in change.
- Utilization of the contextual knowledge of persons affected by change.
- Promote individual commitment within communities, mobilization of communities and multi-stakeholder cooperation in change.
- Adoption of measures to rectify power relationships in favour of positive action.
- Allocate dedicated human and financial resources to transformative inclusion.

ADAPTATION OF RELEVANT ACTORS' PROFESSIONAL APPROACHES TO PROMOTE TRANSFORMATIVE INCLUSION
- For civil society organizations who support communities : develop a partnerchip approach , including provision of space for community voices, self-determination of communities, collective intelligence and care.
- For public authorities : integrate transformative inclusion in public policies and schemes to improve the living conditions of communities.
- For experts, facilitators, support workers and/or evaluators : integrate inclusion and empowerment in the generation of knowledge.

CREATION OF INCLUSIVE SPACES FOR DIALOGUE, IN THE INTERESTS OF EQUITABLE AND SHARED GOVERNANCE
- Create spaces for discussion and governance, within which communities have the facility to adopt their own decisions.
- Adopt mechanisms to for the regulation of power relationships in the governance of initiatives
- Promote alliances, collective intelligence and care as operating principles.

BIOGRAPHIES OF CONTRIBUTORS

→ **ANH THU HOANG** is a global health and development expert with field experience in Africa, Asia, and the Caribbean. Integrating experience and theoretical concepts, she uses design thinking in conceptualization and implementation of research, monitoring, and evaluation activities; these processes are iterative, collaborative, and ultimately more effective.

→ **WILLIAM PATE** co-founded Ad Hoc Analytics, a DC-based statistical consulting firm specializing in quantitative program evaluation. Since 2010, Mr. Pate and his firm has helped nonprofits, federal and state government clients, and other consulting firms on projects related to criminal justice, education, mentoring, and minority issues in higher education.

The mission of F3E and the theme of the book resonated with our recent work on inclusion as it relates to stakeholder engagement

PAYS DE SAVOIE SOLIDAIRE:

→ **"PAYS DE SAVOIE SOLIDAIRES"** is a Departmental platform for stakeholders in international solidarity, established in 1998 on the initiative of the Departmental Council of Savoie. The association has two complementary strands of work: the facilitation of decentralized cooperative schemes of the Department (in Senegal and Haiti) and the development of international solidarity in Savoie.

→ **SÉRIGNÉ MAPATHÉ SAMB:** A specialized educationalist with a DETS (state diploma in social work), a CAP (certificate of professional qualification in education), a Masters in Human Resources Management and a Masters in Sociology from the Assane Seck University of Ziguinchor, PhD student in project management at the Ibero-American University Foundation (Funiber). A teacher from 1995 to 2008, then head of the Departmental service for social initiatives in Bignona from 2012 to the present day.

Author of "Socio-economic integration of disabled persons (a social perspective)" (2011), published by the ENTSS (Senegal national school for specialized social workers); "Socio-economic integration of disabled persons (a sociological perspective)" (2016), published by the Assane Seck University of Ziguinchor.

→ **YANNICK BILLARD:** Agricultural engineer, specializing in international development, from the Graduate School of Agriculture of Angers. Territorial consultant to the Chamber of Agriculture of Isère from 2002 to 2007. Cooperative project manager at "Pays de Savoie Solidaires" from 2007 to the present day. Author of adventure stories (From Chambéry to the Cape of Good Hope - Edition artisans voyageurs (2012) and In the tracks of the little prince - Editions Transboreal (2021))

It has been our intention to contribute to the demonstration of the benefits of reciprocal cooperation, as a means of encouraging changes of approach, both at home and internationally. The theme of inclusion, which has been addressed for some years in the context of the Bignona-Savoie cooperative scheme, is appropriate to a capitalization operation of this type.

AIDE ET ACTION:

→ **"AIDE ET ACTION"** is an association, the object of which is the improvement of access to, and the quality of education throughout the world, based upon the conviction that education allows vulnerable people to escape from poverty. "Aide et Action" thus promotes the social and professional integration of the latter, but also raises awareness and mobilizes public opinion in the interests of a fairer and more mutually-supportive world.

→ **CHARLEMAGNE BIO:** A sociologist, Mr Bio has some twenty years of experience in the management of development projects and programmes, and is affiliated to research centres and laboratories in Benin. A specialist in monitoring and evaluation, he has worked on projects with NGOs at a national, regional and international level, on issues associated with education and professional training, health care and agriculture, the key targets of which have been local authorities, decentralized national government structures, and marginalized and vulnerable groups in the form of young people, children, women and girls. In his capacity as monitoring and evaluation manager for "Aide et Action" in Africa, he has supported projects and programmes for the deployment and monitoring of COAs since 2016, and in conjunction with the PRISME programme. Currently responsible for quality within the International Quality Division, he has been involved in the deployment of tools for the self-assessment of quality within the "Aide et Action" network. In the academic field, he has essentially worked on the analysis of stakeholder policies associated with property management in the context of decentralization in Benin.

Having been involved for over two decades in issues associated with the inclusion and empowerment of all stakeholders in all the processes which concern them, this call for contributions has provided me with the opportunity to share with others some of the experiences which I have acquired in the "Aide et Action" network.

LOUVAIN COOPERATION:

→ **LOUVAIN COOPERATION** (www.louvaincooperation.org) is the NGO of the UCLouvain (the Catholic University of Leuven, Belgium), the object of which is the practical deployment of university expertise

BIOGRAPHIES OF CONTRIBUTORS

for the fulfilment of development challenges. A member of the NGO Consortium of Francophone Belgian universities, Uni4Coop, Louvain Cooperation alerts the university community to issues associated with North-South relations, and supports its partners in African, Asia and Andean America, in the interests of enhancing local capabilities and improving the sustainability of their operations. Louvain Cooperation adopts an integrated approach, i.e. working in a combination of different subject areas (agro-ecology, entrepreneurship, social protection, non-communicable diseases, gender, etc.), in the interests of the optimum fulfilment of Sustainable Development Goals.

→ **VINCENT HENIN** is an economist and socio-anthropologist. Having gained experience as a researcher at the UCLouvain, he then worked in Andean America on behalf of Louvain Cooperation, before returning to head office in 2009, where he supervises the "SAE" Economic and Food Security Programme (in Benin, Bolivia, Burundi, Cambodia, Madagascar, Peru, the Democratic Republic of Congo and Togo).

→ **PAULA UGLIONE** is a psychologist, with a PhD in architecture and psychology. She is a research partner at Louvain Cooperation. Her interdisciplinary academic and scientific career specifically encompasses the field of Environmental Psychology. She has vast experience in the field, working in suburban regions of Brazil.

The F3E call for papers "Include to transform" proposed to participate in a work questioning the meaning, the role and the effects of the inclusion of actors in change processes. We have recognized an unmissable opportunity for sharing the Environmental Integration Tool-based approach (EIT), a methodology with a dialogue-based dimension to its dynamics of structure and approach which is conducive to the empowerment of stakeholders in local development. This process of sharing invites us to review the strengths of this approach, but also its weaknesses and its limitations, in response to the collective and critical philosophy which underlies this procedure.

ESSENTIEL

→ **ESSENTIEL**, a Nantes-based NGO established in 1992, is comprised of legal and natural persons who work together in the interests of promoting popular access to health care, in compliance with the global vision of health defined by the WHO and the Ottawa Charter, working for a fairer and a more mutually-supportive world by developing the right to health care, on the grounds that it should be classified as an essential right.

Its initiatives for international solidarity and social utility focus on vulnerable population groups and contribute to the fight against exclusion and inequalities in health care, society and the economy, while fostering education, citizenship and the preservation and development of social connections.

→ **FLORIAN PERRUDIN**, currently Director of ESSENTIEL, has been involved as an employee of the association for the last ten years in initiatives conducted by the latter for stakeholders in Africa and France, in support of initiatives for the promotion of universal health care coverage, improved health care provision, the promotion of preventative health care, education, citizenship and international solidarity.

He previously occupied the post of coordinator of a regional cooperative scheme in Madagascar, where he collaborated with institutions and civil society on territorial development issues. In Cameroon, he was also involved in a participative consultation on the dynamics of development for a rural territory and its small farming organizations, and started his international career with an involvement in development issues for an environment-friendly cotton industry in Benin.

CIRAD

Hassenforder, E., Lestrelin, G., Braiki, H., Arfaoui, R., Jendoubi, M., Ferrand, N., Morardet, S., Monier, C., Harrabi, C., & the PACTE platform team

It seemed essential to us, in addressing the issue of inclusion, that we should ourselves adopt the most inclusive language possible, reflecting the collaborative nature of our everyday operations. The present chapter has thus been co-written by a collective of stakeholders, all of whom are actively involved in the PACTE programme described in this chapter, and each of whom considers the process of inclusion, and its monitoring and evaluation, from a different angle:

→ **EMELINE HASSENFORDER, NILS FERRAND AND SYLVIE MORARDET** are researchers at the Joint Research Unit for "Water Management, Stakeholders & Applications" (UMR G-EAU), working respectively for CIRAD – the French agricultural research and international cooperative organization for the sustainable development of tropical and Mediterranean regions - (Emeline) and for INRAE – the French national research institute for agriculture, food and the environment - (Nils and Sylvie). They are involved in the development of the "CoOPLAGE" approach described in this chapter, and support its deployment in the PACTE programme.

BIOGRAPHIES OF CONTRIBUTORS

→ **GUILLAUME LESTRELIN** is a researcher at CIRAD in the Joint Research Unit for "Territory, the Environment, Remote Detection and Spatial Information" (UMR TETIS). He coordinates the element of the PACTE programme which is dedicated to the participation of local stakeholders (i.e. multi-stakeholder platforms).

→ **HOUSSEM BRAIKI** is a consultant for multi-stakeholder participation and consultation engineering. He is an associate researcher at the Joint Research Unit for Water Management, Stakeholders and Applications (UMR G-EAU) of CIRAD. He trains and supports facilitators for the PACTE programme.

→ **CHRISTELLE MONIER** is the Manager of the engineering hub for Research and Development projects at CIRAD. She promotes and supports the deployment of the ImpresS ex ante approach described in this chapter.

→ **RABII ARFAOUI AND MERIEM JENDOUBI** are two observers for the PACTE programme – they attend all participative events, and collect data on participants and the content of exchanges.

→ **CHAMSEDDINE HARRABI** coordinated the PACTE programme between 2018 and 2021, within the Directorate General for the Development and Conservation of Agricultural Land (DG-ACTA) of the Tunisian Ministry of Agriculture.

Given that the inclusion of women and young people is one of the central ambitions of the PACTE programme, this chapter is intended to illustrate the difficulties and issues raised by the practical deployment of this ambition in a rural Tunisian context.

ARNAUD LAABAN AND KLARA HELLEBRANDOVA:

→ **ARNAUD LAABAN:** A graduate in sciences from the Paris Institute of Political Studies and the ESCP Europe, Arnaud has over 10 years of experience in the field of consultancy and evaluation, working with public stakeholders and associations in Europe and Latin America.

→ **KLÁRA HELLEBRANDOVÁ:** Doctor of sociology and a member of the Interdisciplinary Gender Studies Group (GIEG) at the School of Gender Studies of the National University of Colombia, Klára combines her experience as a researcher and specialist in the intersectional gender perspective with her experience as a consultant for the evaluation of international solidarity projects.

Why contribute to this work? Having completed a number of studies on employability or empowerment projects – some of which have been supported by F3E – our core concern is to share our experience and provide a means of understanding the empowerment which originates from those who participate in these projects and function as agents of change.

CARTON PLEIN

Carton Plein is an association established in 2012 with the object of promoting the social and professional inclusion of persons in a highly vulnerable situation: the homeless, those without qualifications or without sufficient income. Carton Plein believes in the power of people, and encourages them to start afresh on the basis of their strengths, their skills and their desires. A number of in-house schemes contribute to this objective:
• An inclusion business which, in Paris, supports people to take up work in pushbike logistics (removals, deliveries and collections).
• A training organization, which trains people in the profession of delivery cyclist.
• An inclusion workshop project, conducted in association with the "Early Days" scheme in Paris and Nanterre, which allows the homeless, or those who have been homeless, to restore their confidence, access their rights and get back into work in a fully-appropriate and tailor-made context. Activities undertaken involve the recycling, sale and preparation of orders of second-hand cardboard boxes.

→ **LAURE TURCHET** has been hub coordinator for the Carton Plein association for over two years. Every year, the hub supports approximately 70 homeless people in two workshops. Following her studies in law and political sciences, with a specialization in project management for Humanitarian Project Operations at the ICP (Catholic University of Paris), she gained extensive experience in network support and facilitation operations for the "Secours Catholique" charitable agency in the field of major exclusion, both in France and abroad. She joined Carton Plein in 2017 as a project officer, and became hub coordinator in 2019.

→ **LOUISE LACOSTE** is a PhD student in sociology at the IDHES in Nanterre (University of Paris institute for institutions and historical dynamics in the economy and society), working under the supervision of Maud Simonet. She is completing her thesis under the terms of a CIFRE contract (an industrial agreement for training through research), in association with Carton Plein. Her research is focused on an analysis of the "Early Days" scheme, particularly viewed through the lens of social relations of gender, class and race. She became involved in the association in 2019, during her end-of-study internship, further to the completion of a Masters in Economic and Social Sciences as the University of Paris Nanterre.

BIOGRAPHIES OF CONTRIBUTORS

Together, they have coordinated a research initiative which focuses on the issues raised by inclusion in the "Early Days" scheme. There are two key structural points in this action-research initiative. Firstly, the issue of gender and social gender relations within the scheme. Secondly, the methodological process governing the deployment of collective reflection and, more specifically, the importance of the identification of modes of enquiry and action which will permit the full inclusion of the viewpoints and ideas of supported persons. These are two reasons why they wished to contribute to the work coordinated by F3E.

BATIK

→ **BATIK INTERNATIONAL:** this French organization works for international solidarity in North Africa, Vietnam and France. With the support of its partners, BATIK International aims to develop freedom of choice and action for vulnerable persons and communities, allowing them to become agents of change. Since its establishment, the association has been committed to socio-economic inclusion and the provision of access to their rights for persons in a vulnerable situation. The association enhances the capacities of local organizations, as partners in initiatives, allowing them to support processes for the social and economic empowerment of young people and women, with respect to gender relations, fair working conditions and the fight against all types of abuse.

→ **SARAHI GUTIERREZ:** A native of Mexico, Sarahi joined BATIK International in 2011, having completed graduate studies in political sciences and international relations. She has contributed to the development of the activities of the association, and has managed the deployment of programmes both in France and internationally, working on the basis of change-oriented approaches and popular education tools. With a commitment to feminist issues, she has encouraged the incorporation of the gender-based development approach into the projects of the association. She has been director of the association since 2019.

DONNA MERTENS AND TAMARAH MOSS:

→ **DONNA MERTENS:** Professor Emeritus at Gallaudet University, specializes in research and evaluation methodologies designed to support social transformation. She has authored/co-authored many methodological books related to social, economic and environmental justice and human rights, most recently Program Evaluation Theory and Practice (2nd ed.); Mixed Methods Design in Evaluation; Research and Evaluation in Education and Psychology: (5th ed.). She has consulted with many international agencies, such as F3E, UN Women, Engineers without Borders Canada, and the WK Kellogg Foundation. Mertens served as the editor for the Journal of Mixed Methods Research 2010-2014. She was President of the American Evaluation Association in 1998 and served on the Board from 1997-2002; she was a founding Board member of the International Organization for Cooperation in Evaluation and the Mixed Methods International Research Association.

My life-long exploration of the ways evaluation methodologies can support an increase in social economic, and environmental justice motivated me to contribute to this book.
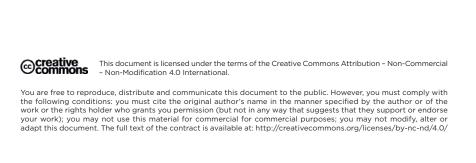
→ **TAMARAH MOSS** is an Assistant Professor at the Graduate School of Social Work and Social Research at Bryn Mawr College. She is an instructor for graduate level social work courses in foundation practice, research methods, data analysis and evaluation for clinical and macro practice. She was a 2020 Fellow with the Leaders in Equitable Evaluation and Diversity (LEEAD) program, focused on culturally responsive and equitable evaluation. Donna Mertens served and continues to be, a mentor to her. Since then, Tamarah is currently a member of the advisory team for the LEEAD program. Tamarah's research, teaching and service are trauma informed, social justice and community-based centered. Her current research interests are threefold: 1) evaluation 2) community-based health and social services with vulnerable and marginalized communities; and 3) social work education and pedagogy, across the United States and internationally. Additionally, she has worked in bi-lingual English-French environments for qualitative data-analysis on child-centered health and social services in West African countries, Côte d'Ivoire and Mali.

I welcomed the opportunity to contribute to this book as a way to support and engage in multidisciplinary learning and sharing, across international borders that enhance perspective and practice in evaluation.

BIOGRAPHIES OF THE MEMBERS OF THE EDCOM

→ **ADA BAZAN**, co-founder of Quartiers du Monde, is an expert - practitioner and trainer in the cross-cutting perspective of gender and development. She has field experience in different contexts and territories, including Madagascar, West and North Africa and Latin America. Ada uses participatory methodologies from popular education, develops and capitalizes on pedagogical material to work and/or integrate gender in the different themes of work.

→ **NOMVULA DLAMINI** has worked for the past 28 years as Organisation Development (OD) practitioner, Social Facilitator, Evaluator and Leadership Mentor with civil society organisations, networks and social movements working in social change. She has facilitated writing workshops, stakeholder dialogues and collaborations, evaluations and action research processes, and coached and mentored young leaders. She has contributed also as writer and writeshop facilitator to various Barefoot Guides (www.barefootguide.org).

→ **ANGELES ESTRADA** has a background in French and international associations and has been director of the F3E since December 2019. Through her experiences in the field and her management functions, she has has consolidated tools for social animation and training on collective action with an emancipatory aim and the development of emancipatory action and the development of the power to act according to the frame of reference developed by Yann Le Bossé. His contributions to the work on the Fonda value chain and the collective impact strategy underline his appetite for putting action into dialogue with reflection and a posture favouring alliance dynamics.

→ **ANNA MAHEU** started her career as a communications officer at Socialter and then at Sparknews. She then went back to school and obtained a Master 2 in Gender Studies. She has since joined Fonda in 2020 as a communications officer, where she coordinated a special edition of the Fonda Tribune magazine entitled "Equality between women and men : a democratic requirement".

→ **ANAÏS MESNIL**, coordinator of the "Place aux Jeunes !"(Make way for the young) project at Engagé-e-s & Déterminé-e-s, a network of young international solidarity associations and leader of Coordination SUD's Youth and International Solidarity Commission, which works to ensure that young people are better taken into account as actors in international solidarity and in French public development policies.

→ **CÉLINE MIAS**, a committed feminist, has been leading humanitarian and development NGO programmes and advocacy in Europe, Africa and Asia for over 24 years. Currently, Ms. Mias is EU Representative and director of CARE International's office in Belgium. Since 2018 she has also served as Vice President of CONCORD Europe.

→ **OLIVIER PIAZZA** dedicates his time and energy to the deployment of collective intelligence in society and more specifically in social and solidarity organisations, whether through the cooperative Les Maisons de l'Intelligence Collective or through his role as Co-Director of the D.U. Collective Intelligence at Cergy Paris University.

→ **LYDIE PORÉE**, researcher in the history of feminist mobilisations. She is an intersectional feminist activist and a member of the Confederal Board of Family Planning, a popular education association that defends and promotes the rights to sexual and reproductive health for all.

What do we understand by inclusion? Who is to be included? What are the links between inclusion and empowerment? Under what conditions can inclusion be transformative? How is inclusion to be adopted in practice?

Inclusion for Transformations investigates the integration of inclusive practices, as vehicles for equitable and sustainable social change. In this work, F3E has brought together stakeholders from the field of research, consultants and practitioners working for the promotion of social justice, both in France and internationally. A one-year process for the exchange of collective intelligence has resulted in the drafting of a dozen articles, together with a postscript. These texts describe methodologies, inspirational experiences and a number of key factors for the support of practical implementation.

REPÈRES
SUR