

## Editorial

- **Theme issue**

Most of the articles in this issue of *PLA Notes* draw on a workshop on 'Participatory Monitoring and Evaluation' which was held in the Philippines in November 1997<sup>1</sup>. The slight delay in disseminating this issue stems from an ambitious publication timetable, which allowed only 8 weeks (including the Christmas season) for the workshop papers to be edited and formatted for the *PLA Notes*. We hope, however, that the wait has been worthwhile as this issue explores a topic in which there is great interest and increasing demand for information.

In spite of the time challenges, Mae Arevalo, Irene Guijt and Kiko Saladores have brought together a reflective theme issue that explores some of the opportunities and challenges of moving towards a monitoring and evaluation process that has greater local value. In their overview, they highlight some of the diverse approaches and methodological innovations that have occurred under the banner of 'Participatory monitoring and evaluation' (PM&E). But amidst the growing number of exciting experiences, many fundamental questions and challenges have appeared, some of which are explored in this issue.

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<sup>1</sup> The workshop was hosted and organised by the International Institute for Rural Reconstruction (IIRR), Philippines. The International Steering Committee comprised representatives from IIRR, Institute for Development Studies (UK), UPWARD (The Philippines), KAISAHAN (The Philippines), Oxfam Hong Kong, Sikiliza International (Uganda), and IIED (UK). The workshop was funded by the International Development Research Centre (Canada) and the Swiss Development Cooperation (SDC), with additional support from IDS and the Department for International Development (UK).

One of the findings from the workshop was the lack of documentation which is "a key obstacle to more innovative and wider use of all that PM&E appears to offer" (Guijt *et al.*, this issue). We hope that readers will be inspired by this issue to document their experiences and share them within the *PLA Notes* network. Furthermore, because of the great interest in participatory monitoring and evaluation, we welcome feedback from readers on any of the issues raised by this theme issue.

- **In this issue**

As always, this issue opens with a suite of more general articles. The first two articles present the innovative use of two very familiar PRA methods: transects and chapati (Venn) diagrams (see also the *Extracts* section). In the opening article, Ishmail Mahiri reflects on the learnings provided by undertaking transects separately with 'experts' and local people. His article explores the boundaries to, and complementarities between, local and 'expert' knowledge. This is followed by an article by Cathy Farnworth who describes the process of undertaking chapati diagrams and reflects on how the outcome is determined by group boundaries and dynamics.

The next two papers explore the use of participatory approaches to planning. Sharon Truelove describes some of the challenges of scaling-up participatory approaches in the decentralisation process in the Gambia, in particular how local plans can be integrated into regional and national planning. Kamal Bhattacharyya and Ajay Kumar highlight that not all participatory planning processes have a lead role for the community in all stages. They describe how their 'alternative approach' tries to enable communities to drive the process.

In the final article in the general section, Marion Gibbon and Gopal Shrestha reflect on the mechanistic way in which participatory approaches have been applied in Nepal. They

describe a workshop process with local NGOs which has attempted to institutionalise appropriate behaviour and attitudes in the training and use of participatory approaches (see also *Tips for Trainers*, this issue, and Somesh Kumar, ABC of PRA: Attitude and Behaviour Change, *PLA Notes* 27, October 1996)

### Regular features

The *Extracts* section in this issue draws on a longer article by Somesh Kumar and describes the use of 3D Venn Diagrams. He shows how 3D Venn diagramming enables complex issues to be examined in a visual way.

In the *Feedback* section, C U Okoye describes some of the trade-offs and challenges in undertaking PRA sessions in homogeneous and heterogeneous groups. Where there are high levels of conflict, groups differentiated, by for example gender or age, can help to build consensus and enable minority views to be heard. In a thoughtful response, Somesh Kumar comments that all too often communities are considered as an homogeneous group. Breaking into different interest groups can enable diverse perspectives to be heard. However, mixed groups can be useful when facilitators are trying to promote common action. The context should determine what approach is appropriate, but where stratification of groups is required, Somesh notes that the criteria for grouping should come from the community themselves.

For trainers in participatory learning, the serialisation of the *Trainers Guide to Participatory Learning and Action* describes the basic principles of participatory learning. It outlines the concepts central to participatory learning and action, together with training suggestions for how to share these ideas with trainees. The *Tips for Trainers* section has been prepared by Irene Guijt and describes a card game that enables participants to discern the false promises from the potentials of community participation.

The *In Touch* pages (at the back of the issue) share experiences and publicise new materials and training events. The *RCPLA Pages* in the *In Touch* section describe the on-going activities of the RCPLA network.

As always, we welcome your comments and contributions for any of the sections in *PLA Notes*. We hope you enjoy this issue.

### UP AND COMING THEME ISSUES

We have planned the remaining theme issues for *PLA Notes* in 1998. The June issue is being developed in collaboration with Action Aid and will explore issues of Participation, Literacy and Empowerment. For the October issue, we hope to draw from a recent workshop on Conservation and Development and compile a theme issue on Participation in Natural Resource Management.