John Curtin Institute of Public Policy – Curtin Business School

Songs of Freedom: Rural Women's Experiences of Poverty and Development in Jamaica

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This thesis is presented for the Degree of

Doctor of Philosophy

of

Curtin University

September 2017

Declaration of Authorship

To the best of my knowledge and belief this thesis contains no material previously published by any other person except where due acknowledgement has been made.

This thesis contains no material which has been accepted for the award of any other degree or diploma in any university.

Signed: …….

Siddier Elizabeth Shirley Chambers

Date: ……15 September 2017..…….

Acknowledgements

Completing my doctoral thesis has been a life-changing experience, both professionally and personally. I extend sincere gratitude to my supervisors Professor John Phillimore, Dr. Amma Buckley, Dr. Gina Koczberski and Dr. Christina Birdsall-Jones. Their patience and gentle guidance have carried me through a meaningful transformation. Professor Phillimore (Prof), you have been a tower of strength from the very beginning and I deeply admire the support you have willingly given to my family and I. I look forward, with great enthusiasm, to a lifelong friendship and our conversations in Patois.

I will always treasure the fond memories made together with the team at the John Curtin Institute of Public Policy (JCIPP). Throughout my years as a student Ms. Leza Duplock provided impeccable academic and administrative support to myself and the other students. Professor Alan Fenna's dependable humours served as timely ice-breakers between intense data analysis and the writing of my chapters. JCIPP's celebratory morning teas were healthy distractions that built camaraderie among staff and students. I cherish the journey we shared. Thanks for being there for me.

To one of my mentors, Professor Amartya Sen, I relish the moment we met and the inspiration you have provided throughout my PhD program. Your astuteness kept me motivated and I aspire to have the same practical compassion for the poor as you have.

I owe a depth of gratitude to the Government of Jamaica and the Australian Government for having given me the opportunity to achieve my career aspiration of completing my PhD.

Thanks to Julie Craig and the team at the International Sponsored Students Unit. I am also indebted to my editors, translators, tutors, relatives and friends.

A special thanks to the rural women and men in Jamaica who have contributed to my experience by sharing their struggles and hopes. Thanks also to the Jamaica Social Investment Fund for facilitating my research on the Rural Economic Development Initiative (REDI) Project.

A heartfelt thank you to my supportive husband, Andrew and to our beautiful daughters Nesia and Samora, thanks for the many sacrifices. Your love and support have no boundaries and I will always love you. Thanks Mama for being our anchor – I couldn't have done it without you.

Finally, thanks to my all sufficient GOD, my Abba, who made this journey possible.

Dedication

I acknowledge that I am a descendant from the people of West Africa who were enslaved in the Caribbean. I acknowledge that I am a beneficiary of the freedom that was fought for and won by my ancestors, which contributed to the abolition of slavery in Jamaica. I recognise that the freedom I now enjoy had cost the lives of many of my people.

So I pay my respect by dedicating this work to the matriarchs in my line of ancestors – those whom have passed, such as Nanny of the Maroon; those who are alive – my mother Edith, my sisters Marie, Sandra and Arlene; the next generation of matriarchs – my daughters Nesia and Samora; and those to come.

May the freedoms that we have achieved be a source of motivation, guiding us to advance other freedoms that we will enjoy and use for the benefit of those to come. Remember that your freedom is not the end that our ancestors envisioned but a means to the end, so use it respectfully.

Abstract

Rural Jamaica has been characterised by high rates of poverty for many decades, with large sized female-headed households accounting for a large proportion of citizens in the poorest quintiles. The Government of Jamaica continues to implement a number of welfare initiatives as solutions to this debilitating human condition. In general, the poverty analysis narrative defines poverty as a condition of limited income and consumption, and emphasises economic development as the main approach to solving poverty. Paradoxically, over the past 15 years, the Government of Jamaica, in partnership with the World Bank, has invested approximately one billion dollars in poverty alleviation, but despite temporary improvements over that period, poverty has increased from 17 per cent to 20 per cent of the population. Furthermore, evidence reveals that the perceptions of poverty and development strategies, of most women in Jamaica, were often outside the scope of prescriptive economic development initiatives.

The presence of these disconnected aspects of national development in Jamaica was the impetus for this thesis. This study addresses the question of whether or not poverty alleviation strategies of the Government of Jamaica have been effective in positively transforming the lives of poor rural women. Situated within Sen's capability approach to human development, this thesis identifies the issues by providing a broader definition of the problem of poverty, and redefines development as the solution. These two revised concepts are then integrated into an evaluation of the impact of a poverty alleviation project – the Rural Economic Development Initiative (REDI) – on a sample of rural women.

Applying the capability approach, a fieldwork study in five rural communities in Jamaica was undertaken, along with interviews with project staff. From this, a broader understanding of poverty and development in rural communities emerged. The research techniques employed included in-depth interviews, focus group discussions, and participant observation, along with a survey. The use of mixed methods and personal interactions with the sample of rural women and men helped to uncover new knowledge about the female participants.

There are four key findings. First, analysis of the data reveals that rural women in Jamaica experience material, social, psychological and physical dimensions of poverty. Second, dynamic relationships between and among these dimensions of poverty are identified. Third, the women value self-determination and the well-being of their children along with community development,

but their relationship with their children and the community often depletes their limited income; yet these relationships affirm their identity and give meaning to their lives. The measure of success of the REDI project was implicitly dependent on rural women surrendering some of their valuable functionings in order to earn more income. While earning more income was valuable to them, it was mainly in the form of aspirations, while the other valuable functionings were tangible. The findings reveal that indeed the REDI project had an impact on all dimensions of the poverty that they experience, but at the time of data collection, REDI had the greatest impact on their psychological capabilities. Yet evaluation of the social and psychological dimensions of their development was not included in the scope of REDI.

Fourth, the findings confirm that poverty alleviation strategies of the Government of Jamaica have the potential to enhance the capabilities of rural women. However, the process of development that is valued by the women is not the same as that of the government. For the sample of rural women, development was more in the process than the outcome and central to that process was the provision of valuable opportunities for their children and community. This included female participants who had no children of their own; they also value the children within their community.

This research asserts that the capabilities and functionings identified are fundamental to poverty alleviation for these rural women because of their unique experiences of poverty and valued approach to development. The public policy cycle generally begins with a definition of the problem, on which hinges all the other stages. By providing a broader definition of poverty in rural Jamaica this thesis contributes to that first stage in the formulation of more relevant development policies, projects and programs. Furthermore, in Jamaica and the Caribbean there is a dearth of applications of the capability approach for impact evaluation, in particular in relation to poverty alleviation programs in rural settings. This study contributes to that void, breaks new ground in human development in the Jamaican context and offers a tool that can provide new knowledge about rural women.

Future studies that refine and extend the survey can contribute to directly fulfilling some of the goals of the National Policy for Gender Equality and helping more Jamaicans to equitably share in the benefits of the achievements of the Vision 2030 Jamaica – National Development Plan. This research and related future studies will thereby be supporting more Jamaicans to both sing songs of freedom and actually enjoy the benefits of more freedoms.

Contents

List of Tables

List of Figures

List of Boxes

List of Plates

Glossary of Patois and Jamaican Terms

Altho	Although
An’	And
Baby-father	Father of the child/children of a woman, who may be her partner
Beyon’	Beyond
Boosie	Display of boastful attitude in relation to one’s ability or possession
Breas’	Breast
Bu’st	Burst
‘Can’t quarrel over spilled milk	Phrase expressing the futility of having lasting regret about unchangeable mistake or occurrence
Cerasee	Locally grown wild bitter herb, used to prepare tea and for other purposes
Chile’	Child, children
De	The
Dem	Them
Don’t have subject	Lack of or limited formal educational qualification
Fait;	Faith
Feel bad	Feeling of sadness
Firs’	First
Fo’	For
Fort’	Forth
‘Guine pig’	Volunteer or participant in a new experimental project
‘Hand-to-mouth’	Term for having an inadequate or subsistence amount of things, such as income
Have subject	Having formal educational qualification
Look	Term used to represent seeking a mating partner
Nex’	Next
Passed di’ worse	Being able to care for oneself

Raw	Unpleasant smell
Rebuil’	Rebuild
Ready-cash	Income earned in the short-term
Ruff	Difficult; challenging
Sky-high	Expensive
Strengt’	Strength
St. Bess	St. Elizabeth
Subject	Formal educational qualification
Squeeze	Economise; being frugal; ‘stretch a dollar’
Yeah man	Yes; I agree; a term used to give approval in informal settings

List of Abbreviations

CASE	College of Agriculture, Science and Education
GAD	Gender and Development
GDP	Gross Domestic Product
GOJ	Government of Jamaica
HEART	Human Employment and Resource Training Trust
IGDS	Institute of Gender and Development Studies
IMF	International Monetary Fund
JSIF	Jamaica Social Investment Fund
JSLC	Jamaica Survey of Living Conditions
JSWC	Jamaica Social Welfare Commission
JWS	Jamaica Welfare Society
MEDC	Maggotty and its Environs Development Committee Benevolent Society
NPEP	National Poverty Eradication Program
PATH	Program of Advancement Through Health and Education
PDO	Project Development Objectives
PIOJ	Planning Institute of Jamaica
PPFA	Prospect Pig Farmers Association Cooperative Society Limited
RADA	Rural Agricultural Development Authority
REDI	Rural Economic Development Initiative
STATIN	Statistical Institute of Jamaica
STWAI	St. Thomas Women's Agriculture Initiative
TBWG	Treasure Beach Women's Group Benevolent Society
TPDCo	Tourism Product Development Company
UNDP	United Nations Development Programme
WAD	Women and Development
WID	Women in Development

Redemption Song by Bob Marley

Old pirates, yes, they rob I,
Sold I to the merchant ships
Minutes after they took I
From the bottomless pit

But my 'and was made strong
By the 'and of the Almighty
We forward in this generation
Triumphantly

Won't you help to sing
These songs of freedom?
'Cause all I ever have
Redemption songs
Redemption songs

Emancipate yourself from mental slavery
None but ourselves can free our minds
Have no fear for atomic energy
'Cause none of them can stop the time
How long shall they kill our prophets
While we stand aside and look?
Some say it's just a part of it
We've got to fulfil the book

Won't you help to sing
These songs of freedom?
'Cause all I ever have
Redemption songs
Redemption songs
Redemption songs

Emancipate yourself from mental slavery
None but ourselves can free our minds

Won't you help to sing
These songs of freedom?
'Cause all I ever have
Redemption songs
Redemption songs
Redemption songs (Marley 1980)

Chapter 1. Status of Human Development in Jamaica

1.1 Introduction

Progress in human development is a significant determinant in the advancement of a nation. Unlocking the benefits of this positive relationship between the people and a society is the fundamental objective of public policy. Public policy encompasses the action and intention of a government along with the intended and unintended consequences (Fenna 2004; Althaus 2007; Phillimore 2013). Achievement of the anticipated benefits of a thriving society remains the goal of public policy of the Government of Jamaica (Osei 2001; World Bank 2004; Dunn and Mondesire 2002; Bowen 2003; Hickling and Gibson 2012; (IMF) 2014).

This thesis was partly motivated by the need to assess the consequences of the action and intention of the GOJ to improve human development. This thesis investigated whether poverty alleviation initiatives of the GOJ have positively transformed the lives of rural women, that is, moved them out of poverty. Another motivation for this study was the general behaviour of women after participating in development projects and programs. It was observed that they often return to their usual way of life with little or no evidence of improvement at the end of a development initiative.

This investigation is significant because it included some of the endogenous variables that directly impact the positive relationship between human progress and national development in Jamaica. Some of those key variables are women, poverty and rural development. The following sections of this chapter establish the contextual background of this study by exploring the significance of those three variables within the Jamaican society. Setting the background begins with an overview of human development in Jamaica, followed by the levels of poverty, actions regarding rural development and the status of rural women. The chapter ends with an outline of the thesis.

1.2 Human Development in Jamaica: Post-Independence Era (1963-2013)

At the international level, Jamaica was ranked 94 among 188 countries and recognised as having high human development in the areas of long life, formal education and gross

national income (UNDP 2017). The country has been given this high ranking since 1990 (UNDP 2017). This ranking offers a perspective of homogeneity about human development within the country.

Regionally, Jamaica, a former slave colony of Britain, is one of thirteen independent islands in the Caribbean, as shown in Figure 1.1 Map of the Caribbean, and is the largest English-speaking island in the region. Regional assessments of the state of human development in Jamaica indicate a stable political system as an advantage but an ineffective management of public office and resources, a characteristic shared by other Caribbean islands, is believed to have stymied the country's overall development (Jones 2002). Ryan and Bissessar (2002) noted that exogenous factors have impinged on regional development. Those factors include trade, operations of multinational agencies, diseases and environmental issues. The authors also discussed implementation gaps, over-prioritisation of economic factors versus the devaluing of socio-cultural factors in the execution of development planning in the Caribbean.

Figure 1.1 Map of the Caribbean
Source: Retrieved from http://geology.com/world/caribbean-satellite-image.shtml

Ryan and Bissessar (2002) recommend a multidimensional evaluation of needs as a prerequisite for development planning and implementation. The Cooperation between the Caribbean Community (CARICOM) continues to promote the intentions of the CARICOM Single Market and Economy (CSME) but it continues to suffer from

implementation lag even as it broadens the development agenda with a focus on technology, renewable energy, human resource development, regional security and a call for greater use of evidence in development planning (CARICOM 2017).

At the national level, Jamaica has a population of 2.72 million (STATIN 2013). Figure 1.2 illustrates that the population is almost equally divided by sex, with females accounting for 51% (1,373,002) and males for 49% (1,344,860), and regionally, 46 per cent of the population resides in rural areas and 54 per cent in urban areas (STATIN 2013). Jamaica is sub-divided into 14 administrative states, known as parishes, which have both urban and rural areas, except for the capital parish of Kingston, which consists of only urban areas.

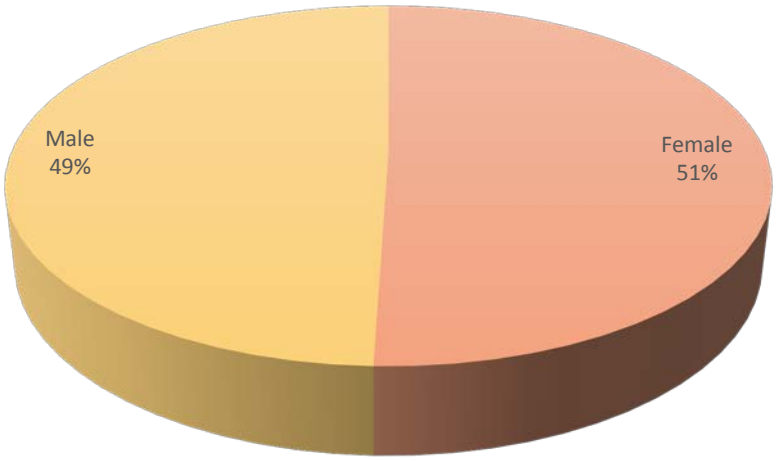


Figure 1.2 Distribution of population by sex
Source: Statistical Institute of Jamaica (2013)

National plans for human development generally include consumption, health, education, housing, social welfare, early childhood development, gender equality, urban and rural development, agriculture and manufacturing, employment and income and social relations (STATIN and UNICEF 2011, PIOJ 2000, Henry-Lee et al. 2001, PIOJ and STATIN 2012). In spite of several efforts of the GOJ, such as National Insurance Scheme and the Programme of Advancement Through Health and Education (PATH) aimed at improving the well-being of the population (Ministry of Labour and Social Security 2006), inequality and poverty remain serious threats to human development. Well-being refers to a subjective state of achievement and freedom (Sen 1985).

1.2.1 Inequality and poverty

Over the past 50 years, the living conditions at the national level indicate high levels of poverty and inequalities across regions and genders (Bailey 2004; Bailey and Ricketts 2003; Benfield 2008; Crichlow 2005; Henry-Lee 2001; Seguino 2003) Although most of these studies provide in-depth knowledge about specific areas of the problems plaguing the society at the national level, they often overlook the needs and interests of the various sub-groups within the society. A historical review of the problems is believed to be useful in revealing some of the underlying factors restricting human development in Jamaica (Beckford 1972).

Gray (2004) and Wade (2012) indicate that because different groups have access to different benefits of the GOJ, discourse on human development is more informative when the heterogeneity of the population is taken into consideration. This is because historically there has been a clear distinction between the three main social classes, upper, middle, and lower classes, which can be identified by their race, location, customs, and access to resources (Beckford 1972b) (Thomas 1999, 2005). The lower class of Jamaicans appears to be predominantly of African descent and are located mainly in rural communities (Desai, Standard and Miall 1970). And while they are the majority within the population (Desai, Standard and Miall 1970), their customs and access to resources are often discussed in relation to those of the upper and middle classes (Beckford 1972b). This implies some aspects of homogeneity across classes. Yet the Jamaican culture seems to be far more complex. Austin-Broos (1994, 215) analyses the arguments of R.T. Smith (1982, 1987), Douglass (1992) and Alexander 1977) and posits that 'racialised notions of ethnicity as rendered in the colour categories become the central content of Jamaican culture.' Inherent in the Jamaican culture are multiple social orders which cut across class and colour (Austin-Broos 1994), even though the 'naturalised hierarchy' that structures the Jamaican society gives precedence to and institutionalised the norms of the upper white minority group in the society (Austin-Broos 1994; Thomas 1999). Therefore, it can be argued that cultural inequality represents one of the many factors restricting human development in Jamaica.

The cultural practices of the upper white minority group became the legal pathways to development, while the practices of other groups, such as the lower blacks, continue to exist as a sub-culture (Austin-Broos 1994; Thomas 1999). Nevertheless, the contribution of the blacks to the abolition of slavery seems to provide them with other opportunities for development (Gray 2004; Mathurin Mair 2006). Still yet the stark difference between the quality of life of the lower and upper classes sustains a legacy of mistrust and suspicion within the Jamaican society (Thomas 1999; Wade 2011) as well as helps to structure two different Jamaicas (Gray 2004).

The dichotomy of the classes is distinct within and across regions. Gray (2004) discusses the divide between the rich and poor in the city of Kingston and analyses how the urban poor accessed political resources to create social capital. But he reveals that the allure of political power has distorted the democratic structure, promoted corruption and honoured violence. Similar to Gray (2004), Wade (2011) describes how the urban poor struggle to survive tribal party politics, under the weight of poverty, crime, violence, poor housing, sub-standard family life, drugs, guns and gangs. He notes that often when the urban poor are at the margin of survival, their transformation often comes through the church. Another perspective of the responses of the poor was put forward by Mintz (1974) (Besson 1984) who examined the lower blacks and put forward the question of whether their poverty was conscious or subconscious resistance to the continuation of symbolic domination as was their reality in the plantation society? Or is their poverty a form of ownership of the intrinsic and extrinsic resources they have accumulated over the 468 years of slavery? Does the legal pathway to development convey aspects of re-enslavement for them? The intentions of the GOJ have not resulted in improvement in the lives or the urban poor.

In spite of the numerous courses of action by successive governments, poverty has been the most persistent barrier to human development in Jamaica, although Figure 1.2 below shows a downward trend until around 2007.

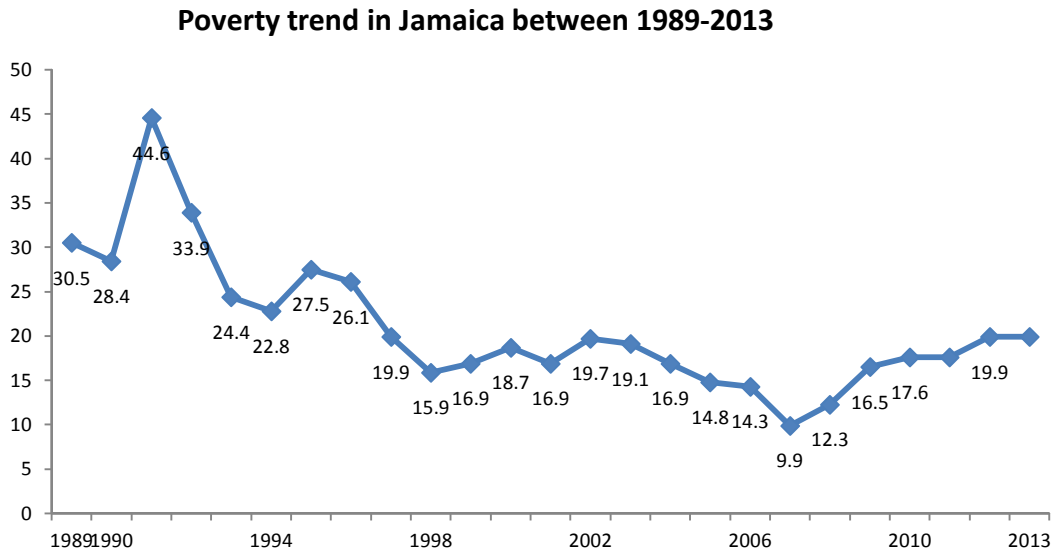


Figure 1.2 Poverty trend in Jamaica between 1989-2013
Source: Reproduced from Poverty and Equity Database, The World Bank Group (2016)

The current development trajectory indicates that there is consensus on the high levels of underdevelopment in rural communities, especially in the areas of social and economic matters (PIOJ and STATIN 2012; PIOJ and UNDP 2004). The assessment by Henry-Lee (2001) of poverty dynamics in Jamaica asserts that rural residents are more disadvantaged and marginalised than the urban poor. The disadvantage experienced by rural Jamaicans was further explained and substantiated by Crichlow (2005) in a review of rural policies pursued in Jamaica over a period of more than 150 years.

The 2010 Jamaica Survey of Living Conditions (JSLC) provides evidence of social and economic deprivations that are contributing to the development of rural areas in Jamaica. The multiple deprivations being experienced by the rural population relative to the total population include highest incidence of economic poverty; low levels of educational attainment; low income earning capability; lack of economic opportunities; largest proportion of poor female-headed households; highest number of children and elderly; poorest housing conditions; largest proportion of individuals who are unable to afford and access health care services; and the smallest proportion of households with access to reliable and clean sources of water (PIOJ and STATIN 2012).

Regarding crime and violence, which are often presented as threats to the safety and security of persons and properties in towns and cities (Henry-Lee 2001; UNDP 2013a; United Nations Human Settlements Programme 2007; World Bank 2004; Harriott 2000; Moser and Holland 1997), rural areas are not immune from these social problems. The Jamaican reality is that all parishes, including rural parishes, are affected by major crimes, such as murder, shooting, rape, sexual assault, robbery, break-in and larceny (PIOJ 2013; UNDP 2013a). But what is the meaning of these concerns in the historical context of rural development in Jamaica?

Additionally, there are structural and environmental forms of deprivation that continue to influence human development in rural Jamaica. These include the inability to access basic social services, poor social and economic infrastructure, lack of coordinated institutional bodies to address poverty, poor environmental practices, high susceptibility to climate change as well as high levels of vulnerability to natural hazards due to the country's location in the Atlantic Ocean hurricane belt (UNDP 2013b; Dunn 2013; Trotz and Lindo 2013). These forms of deprivation are viewed as major factors contributing to inter-generational and persistent poverty in rural Jamaica (PIOJ 2012). Although rural development in Jamaica is being affected by social, economic, structural and environmental forms of deprivation, poverty is still narrowly defined and measured by the monetary value of consumption (Benfield 2010; PIOJ and STATIN 2012). This indicates a critical gap in the definition and measurement of poverty in Jamaica. This is the main problem being addressed by this thesis as it contributes to a broader concept of poverty, and by extension, development.

1.2.2 Intentions for rural development: Post-independence era (1963-2013)

The literature above indicates that there is no real consensus on a pathway or pathways to human development at the practical level. but rather assumptions about the material and non-material resources that the poor have and what they lack. These assumptions appear to be the basis for the formulation of poverty alleviation policies and programs. It must be noted that most of the current development policies and programs are implemented at the national level with limited variation for rural and urban regional differences. Osei (Osei 2001; Osei 2002) examines the Poor Relief and National Poverty Eradication Program (NPEP), aimed at addressing social and economic needs

of the poor at the national level, and bemoans the 'deep-seated problems' of ownership and management of poverty alleviation programs by the Government of Jamaica (GOJ). He recommends greater governance and a new approach that will produce actual evidence of people moving out of poverty as a result of the government's own action. This recommendation is based on the assumption that the social and economic needs of the general population are the same for the sub-regions, such as the rural areas. Also, implicit in this recommendation is the belief that poverty alleviation depends greatly on the actions of the state and less on the part of the poor.

Additionally, Klak (1992) reviews the Jamaican government housing policy to identify why the poor were excluded from low-income housing. He identifies 'the preponderance of market logic, elitism, and prejudice against the poor' (Klak 1992) as the main reasons for the exclusion of the poor from a program that targets the need of the poor. He concludes that 'only through a major philosophical shift [towards non-profit ventures] would the poor benefit in any significant way' (Klak 1992). The concern in this study highlights issues relating to ownership of and tension in distributing material resources by the elites to the poor. Klak (1992) believes exclusion results from the action of the holders of resources and overlooks the possibility that rejection by the recipients could result in the same outcome.

Another common supposition about the poor is that they lack material resources; this belief is often followed by a tacit expectation that they will accept that which is provided for them. The case of the Program of Advancement Through Health and Education (PATH) proves otherwise with a low rate of participation by the poor. Blake and Gibbison (2015), like Klak (1992) attempted to answer why the poor do not benefit as much as intended from the PATH. It is believed that the PATH was designed to address several weaknesses of the previous poverty alleviation programs such as targeting and the application process (Blake and Gibbison 2015). Blake and Gibbison (2015) identify the single male-headed household demography as the main eligible non-participants. And although they indicate issues relating to eligibility of benefits, knowledge of PATH, application process and stigma as major factors in non-participation, they were unable to answer why specific sex of household head tend not to apply for PATH benefits. Answers to such question might have helped to elucidate issues of ownership on the part of the poor, the resources they have and how they use

what they have to address their needs. These are some of the issues this thesis sought to identify through an evaluation of the Rural Economic Development Initiative (REDI) Project.

The intentions of the GOJ to address the persistently high rates of poverty in rural areas are reflected in the Vision 2030 Jamaica – National Development Plan (Vision 2030 Jamaica), National Policy for Gender Equality (NPGE) and the Rural Economic Development Initiative Project (REDI), among other documents. Vision 2030 Jamaica represents the first plan-of-action aimed at long-term development. This plan-of-action is built on the vision of 'Jamaica, [being] the place of choice to live, work, raise families, and do business' (PIOJ 2017). The plan has seven guiding principles with people being at the centre; along with four national goals and 15 national outcomes. Of relevance to rural development is the principle and national outcome number 15 – sustainable urban and rural development. In relation to addressing the persistent poverty in rural Jamaica, the government focused on improvement in housing and decentralised planning during the first three years (2009-2012) of implementation.

The NPGE, which is underpinned by Jamaica's commitment to regional and international agreements on human rights and gender equality, is linked to the Vision 2030 Jamaica. The Bureau of Gender Affairs (BGA) is the government agency with responsibility for monitoring the implementation of the NPGE. The purpose of the NPGE in relation to the advancement of rural women is 'to develop and implement strategies to alleviate poverty and other vulnerabilities among rural women' (Bureau of Women's Affairs and The Gender Advisory Committee 2010, 17). The strategies to achieve this outcome are through research, training and collaboration with other state agencies, educational institutions and other organisations.

The REDI is also an outcome of the commitment of the GOJ to the improvement of human conditions at the national level. This project had sub-projects in 12 of the 14 parishes, involving approximately 11,000 participants. A gender disaggregation of the participants indicated 63 per cent males and 37 per cent females. The rationale for this project was the need to stimulate rural economic growth and address the persistently high incidence of poverty in rural Jamaica (Jamaica Social Investment Fund 2009). Henry-Lee et al. (2001) found that government intentions, such as these policies and

programs, have the potential to positively impact the lives of the poor, if implementation takes on a holistic approach and include the aspects of their lives that are valuable to them. The next section examines those factors that have influenced the quality of life for rural women and might impact the various initiatives of the GOJ.

1.3 The status of rural women

Historically, some of the factors that have influenced the well-being of rural women include family types, reproductive pattern, psycho-social practices, social relations, social activities and economic activities, as well as material resources. In relation to family pattern, Desai, Standard, and Miall (1970) identified eleven family types that were prevalent among poor blacks while recognising that historically the legal structure of marriage was prohibited for slaves; most of these family types are still present in the society (Brown and Johnson 2008). Wyss (1999) and Smith et al. (2003) argue that these are unstable institutions that negatively impact the financial needs and sexual behaviour of youth. Besson (1984), on the other hand, states that the expansion of these 'family lines' were valuable for the development and sustainability of the rural population.

Women and their reproductive roles were valuable to the supply of human capital and operations of the plantation economy (Beckford 1972b; Mathurin Mair et al. 2006). In the post-emancipation and post-independence periods childrearing became the responsibility mainly of the woman (Desai, Standard and Miall 1970). Young girls now have two choices to prosperity, the 'old' and 'new' pathways, to have children and pursue education. But these pathways seem to be in conflict with each other. Children begin secondary education between the ages of thirteen and sixteen (Smith et al. 2003), the same starting period of childbearing for most females in Jamaica (Desai, Standard and Miall 1970; Brown and Johnson 2008).

Smith et al. (2003) note, rural female adolescents in school viewed pregnancy as a burden because it denies them the opportunity to complete their education. But choosing education might not reduce the reproduction burden, as Handa (2000) found that education does not significantly impact the fertility of rural women in Jamaica because childbearing appears to be a fixed preference. Still yet Mason (1985) along with Leslie et al. (2001) argue that balancing productive and reproductive obligations

and functions for some Jamaican women is a precarious feat. Mason (1985) investigates the productive activities, social roles, networks and kinships among a sample of 30 female factory workers in the formal sector and 25 petty commodity producers in the informal sector. She found that work in both the formal and informal sectors is underdeveloped, scarce and risky, and women tend to hold jobs in both sectors. However, mainly because of the nature of their work and their valuable obligation to care for their families, they tend to remain in 'subservient, oppressive conditions while they struggle to survive' (Mason 1985) . Mason (1985) concludes by revealing the deprivation and tension brought on by women's effort to juggle both productive and reproductive functions:

> *Even though women's primary role of mother and nurturer provides increased self-esteem, endearing relations, and a sense of purpose and direction in life, the role has also enslaved them in very narrow definitions, forced them to engage in arduous work forms, and eliminated life options.*

A later study by Leslie et al. (2001) recognises the tension between the productive and reproductive responsibilities of women and the authors were concerned about the impact of such tension on the development of the children in those contexts. The authors therefore conducted a one-year longitudinal study of 109 Jamaican women and their infants. All the participants had other children, while most of them had waged employment during the period of study and they all declared their obligation to the economic and social development of their families as their main responsibility. Leslie et al. (2001) found that while employed and non-employed mothers adopted similar feeding practices of early mixed feeding and long duration of breastfeeding, the precarious feature of their various survival strategies was intensified by three factors. Underemployment, having several dependent children and lack of childcare support were serious threats to the nutritional status of their infants.

The tensions between the valuable reproductive and productive roles, lack of supportive services and facilities and menial economic opportunities are some of the nuances that must be dealt with in the development of rural women in efforts aimed at charting new development trajectories or improving the current ones.

The complex structure of women, poverty and rural development has not received much attention in the Jamaican context (Innerarity 2003). Rather, the focus has often been on the interrogation of gender inequality and development at the national level (Bailey 2004; Bailey and Ricketts 2003; Seguino 2003). This approach to examining the lived experiences of women does not provide adequate information of their diverse realities that could guide more effective policies and programs at the micro level (PIOJ and STATIN 2012; Mathurin Mair 2006, 1995). In many ways it has overlooked their multiple efforts aimed at 'cradl[ing] the family, reshaping it to ensure its survival, redefin[ing] it to include not only kinship relations, but also friendship networks that function as a unit, providing economic, social and psychological support' (Wint and Dunn 1997).

From a neo-liberal development perspective, the outcomes of their efforts are sometimes viewed as paradoxes. Seguino (2003) presents changes in economic development policies as both a restriction to women's labour force participation and an obstacle to their livelihood. She provides further evidence from Jamaica demonstrating that women's unemployment rate, based on information in the formal sector was twice that of men (Seguino 2003), as an indicator of the severity of the problem. Yet formal employment is not the only source of livelihood for these women. Torero et al. (2006) reveals that women in Jamaica accounted for 57 per cent of workers in the informal sector, which is larger than the formal sector, and in 2001 contributed almost the same amount (28 per cent) of revenue to the gross domestic product (GDP) as the formal sector (29 per cent).

Furthermore, Torero et al. (2006) found that women's desire for independence was one of the motivations for their participation in the informal sector. This indicates that neo-liberal development indicators might not reflect the values of some Jamaican women. Like Seguino (2003), Chang (2010) seems puzzled that female educational superiority in Jamaica, where women account for 80 per cent of university graduates compared to 20 per cent for men, has not translated into greater participation in the political arena. Similar concern was shared by Vassell (2000) and Bailey (2004) who provided evidence indicating that the high levels of education for females in Jamaica has not resulted in greater participation in the workplace nor the boardroom. But these

authors fail to acknowledge that economic prosperity and political participation are not be the only needs and desires being fulfilled by the work of the Jamaican women.

The findings above identified and illuminated various dimensions of deprivation based only on the outcomes of the behaviour of rural women. Although relevant to an understanding of the quality of life of rural women, such knowledge is insufficient to ascertain their real choices in a constraint context. In fact, most of the current literature (Seguino 2003; Chang 2010; Vassell 2000; Bailey 2004; PIOJ and STATIN 2012, 2009, 2008) overlooks what rural women actually possess and value. In so doing, these authors missed critical opportunities to acknowledge the role of what they possess in their development.

Additionally, studies (Benfield 2008; Osei 2001) have shown that the perception of poverty and strategies used by most women, to address economic poverty in Jamaica, are often outside the scope of most economic development initiatives.

One strategy that has been an enduring feature of human development in Jamaica is freedom of speech, displayed mainly in songs and poems. Slaves used songs as secret codes and symbols to communicate with each other as well as to express their emotions, describe their conditions and solicit support (Mathurin Mair 2006). *Songs of Freedom* as embodied in the title of this thesis, is a metaphor that has a distinctive resonance in the Jamaican context, from the musical sound of the Abeng blown by the Maroons which serves as a reminder of their victorious battle for their collective freedom; to the world famous song of Bob Marley – *Redemption Song*, through which he declared mental freedom as the ultimate freedom for black people:

> *Emancipate yourself from mental slavery*
> *None but ourselves can free our minds*
> *Won't you help to sing*
> *These songs of freedom?*
> *'Cause all I ever have*
> *Redemption songs*
> *Redemption songs*

The song is also an invitation to others who are able to ‘sing these songs of freedom’ or help the poor to achieve their desired development. Throughout the thesis songs will

be used to illuminate aspects of the desired freedom and the poverty experienced by Jamaicans in general and rural women in particular.

1.4 Research questions and objectives

Given that rural women have been among the poorest for approximately three decades, this research argues that little progress has been made in improving the real quality of life of rural women in Jamaica. Rural women are the unit of analysis in this study. This thesis was guided by the main research question, that is, have poverty alleviation strategies of the Government of Jamaica been effective in positively transforming the lives of poor rural women? In response to the main research question, this study addresses the following objectives to:

1) Provide an understanding of poverty from the perspectives and experiences of rural women in Jamaica.
2) Examine the relationships between social, psychological, physical and material dimensions of poverty.
3) Evaluate the impact of the REDI Project on a sample of rural women.
4) Critically review the valuable objects as well as the processes and opportunities for development of rural women in Jamaica.

1.4.1 Research Methodology

To fulfil the objectives of this thesis primary and secondary data were collected on the lived realities of rural women and the REDI in Jamaica. Secondary data were collected through literature review and primary data from a three-stage fieldwork. The fieldwork applied participatory techniques of in-depth interview, focus group, and participant observations in phases one and two. The third phase of the fieldwork employed a survey instrument.

This thesis applied a combination of qualitative and quantitative research methods. The main purpose of applying mixed methods in this research, instead of a single method, is to provide a better understanding of the research problems (Creswell and Plano Clark 2007). Oakley (1999) argues that the goal of selecting research methods is not necessarily to debate the advantages and disadvantages of one over the other but rather to 'consider how best to match methods to research questions, and to find ways of integrating a range of methods in carrying out socially useful inquiries' (Oakley 1999). Like Oakley, other authors such as Laderchi, Laderchi, and Saith (2003) as well

as Williams (1999) suggest that the most suitable research methods are those that elucidate women's voices and experiences. This thesis sought to capture, as best as possible, a holistic view of how rural women understand and experience poverty and development and the mixed methods was useful in achieving this outcome.

Additionally, the application of mixed methods research was directly influenced by the capability approach, which is the central theoretical framework. Two key tenets of the capability approach are that individuals have multiple capabilities and the capabilities are valuable in and of themselves (Sen 1999b; Alkire 2007a). Mixed methods research was the best way to identify and judge the values of the multiple capabilities of the sample of rural women. To identify the multiple capabilities of rural women a combination of theoretical perspectives included, specifically, the capability approach, self-determination theory, as well as feminist epistemology.

1.4.2 Thesis Outline

The introductory chapter above announces the main aim of the thesis, which is to identify whether or not government poverty alleviation programs have helped to move rural women out of poverty. It provides a brief overview of human development in Jamaica and the complexities of development in a plural society, where different groups have varied access to basic resources and services and the disruption to human development caused by such systematic discrimination. It then goes on to note the narrow concept of economic deprivation which the government and current literature use to explain the quality of life of rural population, as the background to the problem. The main problem this thesis sought to address was a narrow economic concept of poverty, which fundamentally skewed development interventions, such as the REDI project, along the same narrow trajectory. Some of the strategies used in rural development were highlighted, including an overview of the REDI project. Focusing on rural women, the chapter notes some of the nuances of ascribing normative concepts of poverty and development to their quality of life. This was followed by the research questions, objectives and methodology.

The second chapter moves on to define in detail the concept of poverty. It begins with a discussion on the definitions of absolute and relative poverty to provide a background

to the poverty debate. The concept of capability poverty is then discussed based on the capability approach, while introducing the capability approach as the main theoretical perspective that will guide the thesis. Poverty is viewed as lack of capability. Relevant critiques regarding capability deprivation are then highlighted followed by a discussion on the selection of dimensions of poverty within the capability paradigm. Special attention was given to Robeyns' five-criteria-approach, which is applied in the study. The importance of relationships between dimensions of poverty and well-being is presented as a key factor to a broader understanding of multidimensional poverty. The chapter ends with a summary.

The third chapter expounds on Sen's capability approach as valuable human freedoms, which focuses on the ability of an individual to do the things that she reasoned to be important aspects of her development. Lewis' (1955) theory of economic development recognises that both material and non-material possessions influence poverty and development and promotes a balance between both possessions. Lewis' (1955) perspective of the role of non-material aspects of development are interwoven throughout the capability approach due to some similarities in his and Sen's (1999, 1993) ideas about the role of values in the process of development. The chapter then moves on to focus on the concerns, claims and evidence of the capability approach, with an emphasis on evaluating freedoms which requires a high level of reliance on psychological capabilities. A critique of the capability approach is then presented followed by justifications for the inclusion of psychological capabilities for the perspective of the self-determination theory of Ryan and Deci (2000). The chapter concludes with a summary.

Chapter four presents an historical overview of the psychological, social, physical and material development of rural women within slavery and the plantation society. It reveals that rural women during slavery lacked economic capabilities. Although limited, their social and psychological capabilities constituted their main possessions; their physical capabilities, especially their reproductive, caregiving and sexual functionings were valuable to the plantation owners and society as a whole. The chapter goes on to show that not many changes occurred regarding their economic capabilities from an overview of the profession of higglering; their social and psychological capabilities continue to be valuable to them. It further explains that

small changes took place in terms of opportunities for them to use their physical capabilities to meet their own needs and no longer those of the plantation owners. Keen attention was given to the processes and opportunities through which they pursued development and contributed to the abolition of slavery. This overview provides a frame of reference for current approaches to development from the perspective of rural women and those in authority.

Chapter five introduces the REDI project as the government's intention and action towards human development. The chapter begins with a glance at the predecessor of the Jamaica Social Investment Fund (JSIF), which is the implementing agency of REDI. The predecessor was the Jamaica Welfare Society (JWS). Special attention was given to the progressive objectives of the JWS, which had a strong emphasis on self-development and social development as key objectives of a model of community development. The chapter then provides an overview of REDI; a critique of previous evaluations; and ends with how REDI inherited some of the objectives of the JWS while overemphasising economic development.

Discussion on the research methodology is in chapter six. This chapter begins with an outline of the methodological framework, which is followed by a discussion on feminist epistemology as justification for the interpretive and reflective approach to knowledge creation used in the study. The chapter then explains and justifies the research design as mixed-methods, and the various tools and techniques which were employed. This is followed by a description of the sample size; steps and procedures in the data collection process; as well as data analysis and presentation techniques. The chapter ends with a summary.

Chapter seven presents the findings in response to the research question and objectives.

The findings reveal that rural women have multiple needs and sought to meet them by using what they have – social, economic, physical, and psychological capabilities. Their most important possession was their children. Their physical capabilities appear to be very valuable to their quality of life. The economic capabilities were their least valuable possession. A positive relationship between the social and psychological capabilities seems to have a negative effect on their economic capabilities.

Chapter eight consists of the discussion, policy implications and conclusion. The key findings are that the sample of rural women experienced multidimensional poverty; there appears to be a strong relationship between their material and psychological dimensions of poverty; REDI had impacted all dimensions of their poverty, with the greatest positive effect on their psychological dimension of poverty. Furthermore, the means of development – education, health, income and resilience – were common among the sample of rural women and the project management team, and there appears to be no convergence in the process of development that was practiced by the sample of rural women and those discussed by the project management team. Their most important possession was their children. This divergence has significant policy implications, especially as it relates to the implementation process of development projects and programs such as REDI. This divergence can contribute to slower implementation, distortion of project outcomes and appears as if the project was ineffective. Greater attention should be given to public debate on policy and project outcomes and processes by which targets should be achieved. Overall, the impact of REDI exceeded the targets, especially when unintended consequences were included in the evaluation. The study therefore confirms that poverty alleviation of the GOJ has the potential to positively transform the lives of poor women, but equal attention should be given to both the intended and unintended intervention consequences.

This study focuses on women, and recognises scope for further research, noting that more work should be done to better understand the quality of life of the general rural population in Jamaica. Similar studies with men and youth might be useful for policy and program formulation for rural development in Jamaica.

Most importantly, this study provides another way of understanding the quality of life of rural women in Jamaica. Being the first research in Jamaica to examine these four dimensions of the quality of life of rural women, it adds to the limited body of knowledge on the development of rural women in Jamaica. In addition, it contributes to the field of public policy and human development and enhances the global discourses on the evaluation of development initiatives, poverty, and human capabilities by evaluating the intended and unintended impact of the REDI project.

Chapter 2. Defining Poverty

Mi sah who can afford to run will run
But what about those who can't... they will have to stay
Opportunity a scarce, scarce commodity
In these time I say... When Mama spend her last and send you go class
Never you ever play
It's a competitive world for low budget people
Spending the dime while earning a nickel
With no regards to who it may tickle
My cup is full to the brim
I could go on and on the full has never been told – (Untold Stories by Buju Banton 1995)

2.1 Introduction

In Banton's (1995) *'Untold Stories'* he sang about the poverty experienced by poor Jamaicans, such as the scarcity of opportunities, the burden of childcare that most mothers live with as well as their low income and high expenditures. One of the objectives of Banton's (1995) song is to make visible the types of deprivation as he tells the stories of the lived experience of poor Jamaicans. This chapter provides a review of literature that will be useful in theorising the stories of poverty experienced by the sample of rural women in this study. It presents a theoretical perspective of defining poverty, beginning with absolute poverty, then relative poverty and followed by capability poverty. It provides a detailed description of approaches used in selecting dimensions of poverty; a discussion on the relationships between dimensions of poverty and the chapter ends with a summary. Sequentially, the other two chapters contain an explanation of human development as capabilities and an exploration of the valuable freedoms of rural women in Jamaica.

Poverty is viewed as the most complex and enduring blight on human development (UNDP 2000; World Bank 1990; STROE et al. 2012). Over the past century, international and national efforts to alleviate this debilitating human condition have been shaped by three contending theoretical paradigms, namely, absolute, relative and capability. Consistent throughout the century of literature are three defining features of poverty – conception, dimension and operationalisation (Sen 1993; World Bank 2000; Booth 1889). Among the myriad definitions there is some degree of consensus on what is the concept of poverty, but tensions exist within this evolving knowledge regarding the dimensions and operationalisation of poverty (Na´ndori 2011; Benfield

2010; Sachs 2005; Laderchi, Laderchi and Saith 2003; Deosaran 2000; Narayan 2000; Townsend 1979; Beckford 1972b).Conceptually, poverty is generally believed to be a state of lacking, insufficiency and deprivation, essentially the presence of unsatisfied needs (World Bank 2000; Townsend 1979; Sen 1999b; FAO, IMF and UNCTAD 2011). Specifically what those needs are, however, varies across and within paradigms. Some authors posit that the definition of poverty has instrumental value in the functions of government and therefore becomes a priority of public policy (Althaus 2007; Loots and Walker 2016; Glennerster et al. 2004). Hence, defining poverty is not reserved as an ideological prerogative.

An emphasis on the moral obligation as a motivation to address deprivation was another trend in the poverty literature. Globally, the varied concepts of poverty are being used to provide images of the identity and lived realities of approximately one billion people (World Bank 2015; Unnithan-Kumar 1997). Visible evidence of "the evil of poverty" (Rowntree 1941, 450), remains a key driver of international responses to "the world's shared commitments to human dignity and survival" (Sachs 2005, xvi). Yet still these images do not provide the full picture of being poor. More often than not these images provide a limited representation of dignity for the 836 million people living in extreme poverty or overlook the aspirations of the 66 million primary school-age children who are hungry and in school today (Nations 2016). Narayan (2000) and co-authors combined both policy imperatives and moral obligations and produced one of the most influential pieces of work on poverty.

2.2 Dimensions of poverty: absolute and relative

Dimensions of poverty are central to its meaning and construct and have evolved from a single dimension – lack of income – to a web of multiple dimensions (Alkire 2007b; Alkire and Santos 2013; UNDP 2010). Ultimately, solutions to poverty hinge on these dimensions. The study of the role of monetary dimensions, specifically income, has been a prominent area within the poverty debate (World Bank 1990; Booth 1889). Income as a key variable of absolute poverty emanates from the pioneering work of Booth (1889), who embedded economic research in the social reality of citizens in East London (Glennerster et al. 2004). Booth's (1889) empirical investigation established a 'line of poverty' as a tool to prove the magnitude of poverty within East London, by using the socio-economic reality of families (Glennerster et al. 2004). This tool was

constructed using three factors – income and monetary needs of the participants as well as the judgement of the researchers. The 'line of poverty' provided evidence of wide-spread poverty in East London, which in turn, influenced policy directives (Glennerster et al. 2004).

Rowntree (1941) later advanced Booth's work using the same tool but added another dimension, physical efficiency based on nutritional intake, to his investigation of absolute poverty in the City of York (Glennerster et al. 2004). Similar to Booth, he discovered high levels of poverty (Glennerster et al. 2004). However, Rowntree (1941) had a broader concern than that of Booth (1889). His concern was not only about the magnitude of poverty but 'it is the visible life style of want and squalor that was really at the centre of [his] moral concern' (Glennerster et al. 2004, 25). Rowntree (1941) added physical dimension, because he wanted to understand the fundamental impact of poverty on human well-being and why poverty was so persistent for a particular group of people. After examining the life cycle of his research participants, he concluded that their present income was insufficient to provide adequate nutrition for physical efficiency and for them to be productive members of their families and society in general (Glennerster et al. 2004).

The combination of monetary and physical dimensions illuminates low income as a cause of poverty and its negative impact on physical efficiency, which contributed to an interlocking structure of poverty throughout the life cycle of the participants (Glennerster et al. 2004). Approximately forty years later, in his second survey, Rowntree (1941) included social, psychological and spiritual dimensions to his evaluation of poverty and progress of the City of York. Rowntree (1941) main contribution to the poverty debate was the importance of diet, household income and physical efficiency in the life of the poor (Glennerster et al. 2004).

Booth and Rowntree are generally referred to as the fathers of the concept of absolute poverty. Absolute poverty can be viewed as 'the status of an individual or family who receives the minimum income necessary for living, taking into account only the nourishment needs, estimated at the lowest prices found on the market' (Stroe et al. 2012, 58). Rowntree (1941) approach continues to influence many studies in targeting the poor and has had direct empirical influence in the development of national and

international profiles of poverty (UNDP 2014; Edward 2006; STROE et al. 2012). Throughout the poverty literature, combinations of dimensions continue to be an effective approach to reveal causes, characteristics and determinants of poverty (Stroe et al. 2012). What is unclear from the literature however, is the justification for the selection of the various dimensions of poverty.

Throughout the literature, dimensions, mainly those suitable for providing evidence of 'visible want and squalor' along with the 'line of poverty', were used to evaluate the performance and progress in poverty alleviation for over three decades (UNDP 1990, 2014; World Bank 1978, 2013). The 'line of poverty' was modified over the years and later referred to as the poverty line. Rowntree's poverty line continued to influence many studies in poverty research (Edward 2006; STROE et al. 2012). Yet in spite of this influence, the literature provided no direct relationship between economic development, which is the general solution promoted from the application of the poverty line, and poverty alleviation. For example, Chen and Ravallion (2007) conducted a longitudinal study of 100 developing countries over a 13 year period (1981-2004), based on data collected using the poverty line, and found no convincing evidence of a reduction in poverty. Ravallion (2012), in a later experimental study found that economic development had little direct impact on poverty alleviation in developing countries. Ravallion (2012) posits that 'the initial level of poverty may well be picking up other factors, such as the distribution of human and physical capital' (Ravallion 2012, 521). This study of absolute poverty did not provide evidence of what were those other factors.

A common thread running throughout the literature on absolute poverty is that monetary poverty provides tangible evidence of deprivation. It stands to reason why economic deprivation, as a single dimension, might be sufficient to justify a moral response aimed at improving human dignity and survival. A combination of dimensions, such as monetary and physical, provided more knowledge about poverty, such as the causes and negative impact of poverty throughout the life span of the poor. However, addressing the monetary dimension alone appears to be inadequate to reduce or reverse the damaging effects of poverty (Ravallion 2012; Chen and Ravallion 2007). For the purposes of poverty alleviation, a more effective strategy might be the

inclusion of other dimensions, relating to the contextual construct of poverty within a particular society (Ravallion 2012).

The second paradigm in the poverty research has a stronger emphasis on relativity. The literature on relative poverty generally examines multiple dimensions, based on the premise that humans have an array of factors influencing their condition of deprivation (Na´ndori 2011; Tucker et al. 2011; James 1999; Townsend 1979). One of the prominent authorities on relative poverty, Townsend (1979), posited that,

> *Individuals, families and groups in the population can be said to be in poverty when they lack the resources to obtain the types of diet, participate in the activities and have the living conditions and amenities which are customary, or are at least widely encouraged or approved, in the societies to which the poor belong. Their resources are so seriously below those commanded by the average individual or family that they are, in effect, excluded from ordinary living patterns, customs and activities.* Townsend (1979, 31).

Following a similar discourse as his predecessors, Booth and Rowntree (1941), Townsend (1979) deduced the absence of economic resources and social inclusion as the key dimensions of poverty in London. His most notable contributions to the poverty debate are a strong focus on social dimension and the relativity of poverty (Laderchi, Laderchi and Saith 2003). Furthermore, implicit in his concept of poverty are the possessions that give the poor a sense of belonging (Townsend 1979). This idea will be further discussed in a later section of this chapter, which looks at the relationship between poverty and well-being. In a similar approach to Townsend (1979), James (1999, 45) applies the social lens in the context of the Caribbean and defines poverty as 'the lack of adequate level of personal and public resources, including a psychology, necessary to allow a socially desirable life-style and achieve a socially desirable level of satisfaction and self-reliance.' He argues that social, economic, psychological, political and physical factors combine to create a poverty trap for poor Caribbean people.

A different quality of life emerges in rural southwestern Madagascar and adds to the diversity of human existence when viewed through the paradigm of relative poverty. Masikoro, Vezo and Mikea residents of Madagascar exist in a context where 'desires are limited and local resources are adequate to meet them, so that people may experience an "original affluence" of low work, ample leisure time, and an active

social life in which Western notions of "poverty" are meaningless'(Tucker et al. 2011, 292). Tucker and co-authors reject economic notions of poverty and wealth and note that in the Madagascar's context, resources are interchangeable, and deprivation and abundance coalesce and result in approval of a satisfying quality of life aimed at maintaining social institutions rather than solely for wealth accumulation (Tucker et al. 2011). Tucker et al. (2011) discuss social, political, economic, physical, and psychological dimensions of human existence in Madagascar. The authors, from an anthropological perspective, argue that poverty results not from the absence of any specific human dimension but rather an absence of necessary conditions to promote thriving of the dimensions in ways that are valuable to the residents of rural southwestern Madagascar (Tucker et al. 2011).

In the literature the purposes of the dimensions were not only to reveal evidence of poverty, but also to describe the quality of life of individuals and societies. Like absolute poverty, literature on relative poverty identifies the same human dimensions in the lives of those referred to as poor, namely, social, psychological, spiritual, economic and physical. Evidence from the studies on relative poverty indicates correlations between the dimensions. However, the level of deprivation varies across the dimensions and is determined by the resources necessary to function in a specific social environment. Furthermore, some proponents identify scarcity as a natural feature of human existence that is present in all dimensions albeit in varying degrees. This understanding of poverty is rather uncommon in popular literature on poverty. Instead, what prevails is the normalisation of poverty and its association with particular individuals, groups and dimensions of being human. In effect, poverty has become a measure of humanness, where the more poverty you have experienced the less human you are with some dimensions of humanness treated as invisible. In relation to identifying the dimensions of poverty within the relative paradigm, both observer and those classified as poor participated in this process, which is different from the objective poverty paradigm where generally the researcher performs that function.

2.3 From poverty to capability

A noticeable shift occurred in poverty research during the 1990s, a period of persistent economic stagnation for many countries coupled with disillusion about economic development pathways as the route to end poverty (UNDP 1991, 1996). In particular,

this era witnessed the burgeoning of new variables in poverty research, with additions to both theory and practice (UNDP 1994, 1995).

One of the most significant theoretical contributions came from Amartya (Sen 1993, 1999a) seminal work on human capability. Alkire (2007a) shows that through the capability approach the poverty literature has evolved beyond identifying the poor and dimensions of poverty to equipping individuals to pursue valuable ends. Kofi Annan, then Secretary-General of the United Nations endorses the approach and notes that it has provided a new framework, a 'paradigm-altering foundation' that is premised on a critical examination of the nature of poverty, which humanises the poor 'by showing that the quality of our lives should be measured not by our wealth [or the lack of], but by our freedom' (Annan 1999). Within the capability paradigm poverty is 'the lack of or failure to achieve a minimal combination of basic capabilities' (Sen 1993, 41). Such failure could result from deprivation of capability, functioning, freedom or agency (Sen 1993, 1999a). According to proponents of the capability approach, these variables provide an alternative to the unidimensional monetary-based paradigm that has dominated poverty research for most of the century (Sen 1993, 1999a; Robeyns 2003a; Nussbaum 2003; Nussbaum 2001; Frediani, Boni and Gasper 2014). Sen's (Sen 1993, 1999a) main critique of this dominant monetary model was its narrow focus on income as the means to alleviate poverty and its general attempt to homogenise inherent human diversity. This latter concern is shared by proponents within the relative poverty paradigm (Townsend 1979).

Three of the key assertions underpinning the concept of poverty as capability deprivation are that, first, it has a strong focus on intrinsic deprivations; second, the inclusion of other dimensions which influence deprivation; and third, it recognises that monetary resources do not always have a direct effect on what people can do or become, due to heterogeneity in context (Sen 1999a). This approach conveys value and relevance on all human dimensions. It claims that all human beings are endowed with capability in all dimensions albeit in varying degrees (Sen 1993) and being human includes multiple dimensions, such as social, psychological, economic and physical (Sigelman and Rider 2014; Narayan 2000).

A review of literature on three theoretical perspectives, absolute, relative and capability provides evidence of the multiple dimensions of poverty. Consistent across the paradigms is an acceptance of interdependence among the various dimensions. There are however, a number of important conceptual and methodological differences between the three paradigms. Conceptually, poverty has evolved from the lack of material resources to include various conditions that influence human capability deprivations. This heterogeneous feature is one of the significant differences between the two previous paradigms and the capability approach. Studies on absolute and relative poverty indicate a general silence of the poor, with little or no reference to their perspectives of lived experiences. Knowledge about multi-dimensional poverty, especially from the viewpoints of the poor, was a major gap in identifying poverty using the paradigms of absolute and relative poverty. Addressing this gap was one of the central objectives of the capability approach.

Inclusion of the poor seems to be critical at arriving at the appropriate conceptualisation of poverty because the wrong concept of poverty can lead to inadequate intervention (Laderchi, Laderchi and Saith 2003). For example, Narayan (2000) and co-authors consulted with the poor in 47 countries and from their analysis, which the World Bank (1999) regards as one of the most influential pieces of work on poverty, they found new information about the complexities of poverty. The authors admitted that it would have been difficult to uncover such depth of information without the consultative process and participatory tools. In Porter (1991) and co-authors earlier study they pointed to inadequate consultation with the poor as well as ineffective policy process and ill-conceived interventions as the main reasons for the failed Australian aid-funded rural development project, the Magarini Settlement Project in Coast Province, Kenya. The authors noted that the failed project also contributed to a significant waste of resources and ruptured diplomatic ties.

Critiques relevant to capability deprivation. Even though Sen's (1999b) capability approach was received with great optimism (Alkire 2007a; Robeyns 2003a), like Booth and Rowntree, he did not provide a formula for the selection of a list of dimensions. In fact, some of the earlier critiques of the capability approach were premised on vagueness of several aspects of the approach, including the absence of a clear selection process for a list of dimensions of poverty and capability (Gasper 2007;

Nussbaum 2003; Cohen 1990). Although (Nussbaum 2003; Nussbaum 2011) endorses the liberating and human-centred underpinnings of the capability approach, she criticises it for being too open due to the absence of a prescribed set of minimum capabilities or at least a list with the most important dimensions. In responding to this critique, (Sen 2004) argued that the starting point for examining capability deprivation or development as freedom should not be a prescribed list, mainly because such a list would undermine human heterogeneity and public reasoning, which are fundamental tenets of the capability approach. In his response he stated:

> *Pure theory cannot "freeze" a list of capabilities for all societies for all time to come, irrespective of what the citizens come to understand and value… There is also the problem of determining the relative weights and importance of the different capabilities included in the relevant list… To insist on a fixed forever list of capabilities would deny the possibility of progress in social understanding and also go against the productive role of public discussion, social agitation, and open debates* (Sen 2004,78-80).

Another concern about the approach is that given the strong emphasis on reasoned valuation of the poor in the selection of capabilities, it is possible for those capabilities to be tainted by adaptation to deprivation. From this perspective, Gasper (2007) points out that tensions exist between reasoned valuation and prioritising capabilities. He further notes that those theoretical tensions become more problematic during operationalisation. This, along with the current embryonic state of capability prioritisation, he argues, exposes the approach to distortion and inappropriate reduction. In support of Gasper (2007) concerns, Austin (2016) found that in fact adaptive preference influenced the reasoned valuation of citizens in Britain during economic crisis. In her study she argues that such cognitive outcome resulted in 'a diminishment of internal capability, and therefore shrinkage of her combined capability set' (Austin 2016). Inclusion of aspirations in the selection of capabilities and other forms of valuation such as open debate on the conception of valuable outcomes and capabilities were recommended as strategies to minimise the distortive effect of adaptive preference on capabilities (Austin 2016; Gasper 2007). However, it is important to acknowledge that human adaptation is an ever-present danger in the capability space (Sen 1985).

2.3.1 Selecting dimensions: Operationalising the capability approach

A bourgeoning of participatory research methods in development studies coincided with an increase in the application of the capability approach at the start of the 21st Century. Nevertheless, the current state of the literature does not provide a clear procedure on operationalising the capability approach. This component has been the preoccupation of a number of capability scholars such as Nussbaum, Robeyns and Alkire, who have expanded the framework through their theoretical and empirical contributions mainly regarding selection of capabilities. Three different processes emerged from the review of literature of empirical studies undertaken for this research. They are (1) Robeyns (2003a) five criteria procedure, (2) selection from Nussbaum (2003) list of central capabilities, and (3) cases in which some authors refer to the participatory method of data collection as a capability – all three procedures generally apply qualitative methods but differ in the processing steps. It must be noted that there are two key divergent perspectives on the selection of dimensions and capabilities, with Nussbaum (2003) proposal of a guiding list of central capabilities and Robeyns (2003b) procedural approach to the selection process.

A variety of studies now employ several participatory methods in the process of selecting dimensions of poverty and capability. This approach allows research participants to explicitly engage in critical thinking, which is an important aspect of participation within the capability paradigm. Some authors (Wilson-Strydom 2016; Buckler 2016; George 2015; Walker, Berekashvili and Lomidze 2014; Loots and Walker 2016) use qualitative and quantitative methods for the operationalization of the capability approach. These methods are defined and discussed in the methodology chapter. Descriptions of the three operational processes now follow, starting with Robeyns' five criteria procedure.

Process I: Application of Robeyns' procedural approach. Robeyns (2003b) established a procedural approach with five criteria for the selection of functioning's, capabilities and indicators of poverty. This procedure promotes preservation of human heterogeneity as well as the inclusion of monetary and non-monetary aspects of well-being, which are two central tenets of the capability approach (Alkire 2007b; Robeyns 2003b; Sen 1999a, 1993). The five criteria are explicit formulation, methodological

justification, sensitivity to context, different levels of generality, along with exhaustion and non-reduction (Robeyns 2003b).

First, the criterion of explicit formulation requires that the list be explicit, discussed and defended. Second, the criterion of methodological justification is based on the assumption that the methods have an indispensable role in the formulation of a relevant list. Given such importance, the techniques must be explicitly described and their suitability justified for the task. Third, sensitivity to context is about writing in abstract language of the relevant field of study, which could support previous findings and help to expand the new body of empirical evidence of the approach. Fourth, the criterion of different levels of generality allows for a phased process in the formulation of the list, which should start with an ideal list and end with a pragmatic list. Exhaustion and non-reduction is the final criteria and requires that all important dimensions be included without substantial overlapping.

Robeyns (2003b) observed that while there might be commonality of dimensions across various lists of capabilities 'it is the context and strategic reasons that play the major role in determining the length and content of different lists… [And] it will remain important to involve the affected people in the selection of capabilities.' She further cautioned that 'without this multi-stage procedure, the list could automatically reproduce the existing biases' (Robeyns 2003b). Alkire (2007a) endorses Robeyns' five criteria as a procedural approach which advances the capability approach and emphasizes its value in selecting dimensions in the context of chronic poverty and reiterates the importance of using mixed methods.

In the study by Wilson-Strydom (2016), using Robeyns' procedural approach she developed a list with seven capabilities for equitable transitions to universities for students pursuing higher education in South Africa. She drew on Nussbaum (2003) study to define the selected capabilities. The study provided detailed explanation of a two-stage top-down-bottom-up process carried out over approximately two years.

One of the major concerns of applying the capability approach is the uncertainty of knowing that the relevant and appropriate capabilities and dimensions are included in the research project. Wilson-Strydom (2016) addressed that potential limitation

through an extensive literature review on relevant educational issues from both the South African and international perspectives. She notes that triangulation, participation and deliberation were embedded in the research process.

The seven capabilities developed by Wilson-Strydom (2016) are practical reason; knowledge and imagination; learning disposition; social relations and social networks; respect, dignity and recognition; emotional health; and language competence and confidence. These capabilities are connected to psychological, material, spiritual, social and physical dimensions of human development. This study provides empirical evidence of the applicability of Robeyns (2003a) five criteria procedural approach for selecting relevant capabilities. Spreafico (2013) also employed Robeyns (2003a) five criteria in another empirical study. In this study she developed, as a policy proposal, nine capabilities to enhance the learning experience of students at Barnard College, which is a women's liberal arts college in New York. Furthermore, from a philosophical standpoint, Cresswell and Uteng (2016) drew on Robeyns (2003a) criteria to make a case for the inclusion of mobility as a central capability because of its role in helping women as well as men to unlock other capabilities such as agency and freedom.

Process II: Reflective participation as capability. While the following process for selecting dimensions of poverty and capability is not as extensive as Robeyns' procedural approach, it makes a bold claim that some qualitative techniques are not just means of identifying capabilities but were viewed as capabilities within themselves, mainly in the context of project evaluation. This is because the act of participating in project evaluation allows participants to use skills they might not have otherwise used, such as critical thinking and collaborative approach to problem-solving (Schischka, Dalziel and Saunders 2008). Fundamentally, participatory methods enable individuals and groups to effectively contribute to actions that influence their lives, in that, their opinions are valuable and impact programs and projects in a meaningful way (Chambers 1997). Participatory method is different from qualitative method. According to Chambers (1997, 177), participatory method is 'where people are consulted, where they participate freely, where their needs and priorities are given primacy in project identification, design, implementation, and monitoring.' On the other hand, qualitative method encompasses the use of

unstructured or semi-structured techniques. Some common methods include focus groups, individual interviews, and participant observations (Creswell and Plano Clark 2011). The sample size is generally small when employing qualitative methods in research.

For example, Walker, Berekashvili, and Lomidze (2014) used literature review along with several qualitative and quantitative techniques to develop a gender survey as a tool to evaluate the Market Alliance against Poverty project. Multiple focus group discussions were convened separately for women and men, in diverse villages in rural Georgia. Participants engaged in discussions about constraints and opportunities in the marketing and time engagement and revealed several monetary, social, physical and psychological indicators of poverty and capability. The authors noted that one of the key findings of the study was that the measure of success for the project management team was different from those of the participants, and that leisure as well as economic opportunities and household chores were valuable to the women in the study. The authors argue that the use of the participatory techniques were central to unpacking the complexities of constraints and opportunities experienced by the participants. Interestingly, the authors claim that the process of selecting dimensions of poverty and capability was an opportunity which expanded the capability of the participants to be critical of their daily living. To expound this claim Walker, Berekashvili, and Lomidze (2014) referred to Freire's (1970) concept of 'conscientization' and stated:

> *Processes of gender research, such as… time use survey, by making visible differences in women and men's time uses, and decision-making about how they use their own time, can in themselves begin to change attitudes about the gendered nature of time uses and control over time, through creating spaces (e.g. in focus group discussions) for critical reflection and exposure to alternative practices and norms.*

Freire (1970) argues that the underlying value of 'conscientization' is that it 'makes oppression and its causes objects of reflection by the oppressed, and from that reflection will come their necessary engagement in the struggle for their liberation.'

Similarly, Schischka, Dalziel, and Saunders (2008) operationalised the capability approach with participatory methods and claimed that focus group discussion was an opportunity for reflective participation both for participants and researchers. They referred to Freire's (1970) description of 'reflective participation' to validate their

argument. Through their study of rural women in Samoa, the authors uncovered that the focus group was:

> *A mechanism for facilitating reflective participation by program members… Participants spoke not only of learning new skills, but also of discovering capabilities they already had but which they had not previously realised could be valuable in creating self-help opportunities… [And identified] a range of non-monetary gains from participation*. (Schischka, Dalziel and Saunders 2008)

Regarding focus group as a capability, Schischka, Dalziel, and Saunders (2008) believed that it was an opportunity for public reasoning and deliberation at the micro level, which could promote meaningful discussions about values and needs relevant to the participants and their social context. They also noted that it was a critical tool in broadening the information base for the evaluation of the projects. This second process of selecting dimensions of poverty and capability through participatory methods adds a new claim to the operationalisation of the capability approach, that is, the belief that the actual selection process is a capability in itself, as participants were able to scrutinise their practical reasoning through reflective participation.

Process III: Selection of dimensions from pre-existing list. The third process found in the literature appeared to be an arbitrary selection of dimensions from Nussbaum (2003) list of central capabilities with some justifications from feminist literature (Chattier 2012; Sanchiz 2010). A valuable contribution however, of these studies, was the clear identification of relationships between the capabilities and dimensions of poverty. The studies also argued that participants engage in reflective participation when participatory research methods are employed. For example, empirical studies conducted with rural women in the Pacific islands of Fiji and Samoa employed focus group discussion, discussion guide, interviews and participant observation and uncovered indicators of poverty and capability from narratives of their lived experiences(Schischka, Dalziel and Saunders 2008; Chattier 2012).

Through the use of focus group discussions rural women in Samoa were able to critically reflect on themselves as individuals and as groups, as well as members of the Women in Business Foundation (WIBF). Schischka, Dalziel, and Saunders (2008) noted that the women were critical of the limited market opportunities and low price

being offered for their products through the WIBF program. But they also recognised that they had become financially independent through their participation in the WIBF.

The study further revealed that the participants noted that their financial independence also gave them a sense of achievement, pride and self-confidence (Schischka, Dalziel and Saunders 2008). Their participation in the program expanded their skills, contributed to greater utilisation of local resources and was an opportunity to revive and sustain their family and community heritage of weaving (Schischka, Dalziel and Saunders 2008). In addition, it was noted that the older participants stated that they valued being better able to financially contribute to the education of their grandchildren, while the younger ones considered being able to improve their provision of reciprocal caregiving, to their parents and grandparents, as a form of achievement (Schischka, Dalziel and Saunders 2008). Being able to financially contribute and participate in family weddings and funerals and the church community were highly valued by the research participants in this study.

In another empirical research, Chattier (2012) employed focus group discussion and participant observation. The 18 rural women in the study were able to critically reflect on their reality within their Fiji Indian context and identify various indicators of poverty and capability. Most of the participants were critical of their culture and its gendered division of labour, while acknowledging diversity and change in gender roles and responsibilities. The women acknowledged how their mothers-in-law – central to their kinship-based seniority – restricted their autonomy and contributed to their unhappiness, as well as that the laziness of some of their husbands contributed to their domestic work being burdensome and limited their economic and leisure opportunities (Chattier 2012). Chattier (2012, 87) stated that 'the community norms and family pressures continue to serve as a strong barrier to women's mobility, visibility and autonomy.'

Another finding from Chattier's (2012) study indicated that the families and the women themselves valued their reproductive capability and there were cases in which childcare and domestic chores were shared responsibilities between males and females – both children and adults (Chattier 2012). Overall, the author argued that intra-household inequalities, time engagement, mobility, leisure and work should be critical

factors in defining poverty. These factors were identified through the use of qualitative methods. Chattier (2012) reiterated the need for greater application of these methods to help to better understand the lived realities of the poor. Chattier (2012, 91) concluded her argument by stating:

> *Rather than relying exclusively on large-scale surveys, there is a need to utilize more responsive and participatory forms of data collection, including qualitative techniques. Such methods are capable of producing additional data necessary to understand how poverty is experienced by women and men, and to reveal the intersection between poverty, gender, and other markers of* [identity]*… As a result, we may be better placed not only to measure, but also to understand the causes, realities, and consequences of poverty, and the ways in which it shapes women's and men's lives, choices, and chances.*

Focus groups were not the only qualitative mechanisms that gave research participants opportunity for reflective participation. Fernández-Baldor et al. (2014) applied a combination of literature review, individual interviews, participatory workshops, feedback sessions and focus group to their evaluation of an electrification project with women and men in rural areas of Cajamarca, Peru. Emergent from the narratives of the rural women and men, the study found that fixed time for project participation restricted their involvement in religious and community activities and their illiteracy and lack of electricity limited their spiritual development, which was noted as being valuable to them. As a result of the provision of electricity, the study found that the project had achieved its intended goals on the communities and individuals such as reduced air pollution, better access to communication, adequate lighting at night and increased productivity for local businesses (Fernandez-Baldor et al. 2014).

Emergent from the narratives of the rural women and men, in the study by Fernandez-Baldor and co-authors (2014), were unexpected benefits such as expansion in capabilities related to religion, leisure and community participation. The authors also observed that participants experienced different benefits from the same project. They also discovered that community participation during the long implementation period contributed to collective cohesion and learning and that unequal distribution of project benefits had the potential to provoke discord and disrupt community cohesion (Fernandez-Baldor et al. 2014). These latter findings were the result of reflective participation on the part of the participants and authors but the process and benefits of reflective participation were only implied throughout this study. Other Latin American

authors who have contributed to the debate on the multidimensional nature of poverty include Santos, Villatoro, Mancero and Gerstenfeld (2015), who provided a useful multidimensional poverty index for Latin America. The authors examined housing, basic services, living standard, education, as well as employment and social protection. Statistical analysis of these dimensions revealed a decline in poverty at the macro level, although disparities across rural and urban regions were identified. These findings validate the usefulness of the multiple dimensions but the authors were unable to effectively address regional differences in poverty. The work of Iguiniz Echeverria (2013) also adds to the debate on multidimensional poverty. He argues that while multiple dimensions are useful they can also function as barriers to poverty alleviation and should therefore be carefully understood and managed at the community or societal level. It must be noted that some studies, like the aforementioned ones, that examine poverty at the macro level are often unable to provide important details of the nature of poverty, and such detail is critical to for poverty alleviation strategies.

In another study George (2015) employed in-depth interviews and a survey and uncovered that waste-picking women in Kerala, India had multiple valuable functionings even within their context of socio-economic deprivation. However, the role of participatory methods in the process of identifying those valuable functionings was not explained by the author.

In summary, operationalisation of the capability approach, for the identification and selection of poverty and capability dimensions, has made three significant contributions to the literature on human poverty and development. First, the perspectives of the poor have become a fundamental aspect of the various applications of the capability framework. Secondly, empirical studies uncovered that the participatory process of consulting the poor on their lived experiences is a capability in itself, as it provides them with opportunities to critically participate in assessments of the things they value and contribute to public reasoning about their lived realities. Thirdly, from the critical assessment by the poor of their lived realities emerged intricate relationships between the various dimensions of poverty and capability. These relationships revealed features of the nature of poverty and development that would possibly remain invisible without the reflective participation of the poor themselves.

Even though these contributions are valuable outcomes of the evolving debate on poverty, development and the capability paradigm, the multiple methods described above indicate the use of a range of methods in selecting dimensions. However, some studies lacked explicit justifications for the data collection techniques employed and thereby overlooked the central role of methods in defining poverty and capability (. Furthermore, Sen (1999a) emphasised the need to interrogate 'coupling of disadvantages' because it is crucial to an understanding of the nature and characteristics of poverty. Evidence in the literature of complex connections between various dimensions of poverty, as discussed by the poor themselves, reiterate the need for such an interrogation as part of the process of defining poverty. Yet it should be noted that, until now, it appears that limited investigations have been undertaken to explore the relationships between dimensions of poverty and how they contribute to the nature and characteristics of deprivation.

This thesis makes a contribution to two of the three knowledge gaps identified above. First, in this chapter explore the connections between various dimensions of poverty as well as the linkages between dimensions of poverty and well-being. This exploration continued into the presentation of the findings and discussion. Second, the literature review revealed that Robeyns (2003a) five criteria procedural approach encompasses more tenets of Sen's capability approach than the other processes of selecting dimensions of poverty and capability, as validated by Wilson-Strydom (2016) and Alkire (2007a). Given the theoretical and empirical robustness of this process, I employed Robeyns' five criteria procedural approach in this study to develop the dimensions and indicators of poverty and the list of capabilities. A detailed explanation of this process is contained in chapter 6, the methodology.

2.4 Relationships between dimensions of poverty

A narrow, stereotypical idea of poverty provides the same knowledge – people with limited money or income are economically poor and are unable to meet certain needs. So what? This was the question that confronted development agencies and practitioners after the ground-breaking study entitled *Voices of the Poor* (Narayan 2000). The study provides empirical evidence from the experiences of the poor in 47 countries that there are inter-locking relationships between multiple forms of poverty (Narayan 2000). For example, in Townsend (1979) study of poverty in London, he

revealed that the lack of customary or valued resources, mainly material resources, deprived individuals of social inclusion which was accompanied by feelings of exclusion, shame, humiliation and loneliness. Townsend's definition of poverty emphasises that being and feeling part of a community are important aspects of human living condition. Although social indicators, such as group consensus, community customs and values, as well as psychological indicators, like emotional experience about one's living condition and belief, factored greatly in Townsend (1979) concept of poverty, they were absent in his measurement.

However, to his credit Townsend later contributed to a broader measurement of poverty in Britain (Gordon et al. 2000). The report on Poverty and Social Exclusion in Britain provides information on the 1999 Poverty and Social Exclusion Survey of Britain. The survey included measures such as consensual social indicators, social exclusion, income and minimum subsistence (Gordon et al. 2000). Among the key findings noted by the authors were the large number of adults who lacked adequate clothing because of insufficient income; the large number of people who were without adequate food due to insufficient income; and women were amongst the poorest in the society (Gordon et al. 2000). The authors point out that 'lack of paid work is an important factor in causing both poverty and social exclusion. However, even if full employment were achieved, poverty and exclusion would not disappear' (Gordon et al. 2000). The authors made this statement because of the strong influence of other factors on the nature of poverty as experienced by the citizens of Britain.

In a later article Townsend (2010) maintains his original stance on the relativity of poverty (Townsend 1979) yet he bemoans the lack of development in the study of poverty during the 21st Century and calls for a new approach. The main deficits in poverty study as identified by (Townsend 2010) is the narrow focus on enhancing physical efficiency and that 'physical efficiency of individuals [are] divorced from their psychological well-being and the organisation and structure of society.' However, it must be noted that even though this idea of the interrelationship between physical, psychological and social well-being might appear to be a new proposition of the author, it is rather a long held view of Townsend which was explicit in his seminal study of *Poverty in the United Kingdom* (1979). Therefore, what is urgently needed is

evidence to accept or reject this long-held belief, which is shared by other authors who are concerned about poverty (Lewis 1955; Beckford 1972b).

In another study, Hundeide (1999) used ethnographic data on the poor in four different countries – India, Indonesia, America and East Europe – and uncovered strong connections between psychological poverty, psychological capability and economic poverty. One of the key findings of that study was that research participants in all four countries used psycho-social perspectives to construct their meaning of poverty. The slum-dwellers in India linked their material deprivation to the caste system and shared identity along with public reasoning to justify their poor living condition as part of their fate. Furthermore, the author stated that part of their belief was that individual efforts might not be an effective pathway to development, which was noted as a contributing factor in their expressed satisfaction with their fate as well as a sense of acceptance and resignation. This behaviour of the poor was referred to as 'transcendental fatalism… [The belief that] there is not much point in personal initiative and efforts as life unfolds itself according to its predestined pattern despite their personal efforts'(Hundeide 1999, 147).

For the migrant peasants of Indonesia, their poverty was also associated with fate, but based on their religious beliefs, such fate can be improved through individual religious practices and not external efforts. Similarly, the Jews of the ghettos in Eastern Europe also exhibited strong connection with their poverty and religion. However, their connection was in contrast, because they exhibited transcendental hope based on their religious belief and principles, while the other group expressed transcendental fatalism. This reveals that the relationship between poverty and religion can have contrasting meanings, in that, religion can be a barrier or a form of escapism from poverty as well as provide direction to practical opportunities for alleviating poverty. The author described transcendental hope as 'being able to detach oneself from the sufferings of everyday life and to keep up the human vision of a better world of love and brotherhood' (Hundeide 1999). The author noted that the slum-dwellers in America experienced both material poverty and psycho-social poverty because they were within an individualistic culture where individual effort was the foundation of progress and poverty and where social capital and transcendental capability were not highly valued. The participants within such context exhibited:

> *A deep sense of inferiority and personal depreciation… In order to cope with this situation, they develop a careless, moment-to-moment orientation of immediate gratification without delay and future planning. At the same time, this coping strategy negates any possibility of improving their long term situation (Hundeide 1999)*.

The poor in Hundeide (1999) study, though they all were in similarly low economic situation, used their social and psychological states to construct and respond in different ways to their monetary poverty. This indicates that their social and psychological functionings constituted valuable and useful aspects of their way of life.

Narayan (2000) illuminate the complex layers of social and psychological sufferings in the lives of the poor. From their findings they stated:

> *Poor people's definitions reveal important psychological aspects of poverty. Poor people are acutely aware of their lack of voice, power and independence, which subject them to exploitation. Their poverty also leaves them vulnerable to rudeness, humiliation and inhumane treatment by both private and public agents of the state from whom they seek help. Poor people also speak about the pain brought about by their unavoidable violation of social norms and their inability to maintain cultural identity through participating in traditions, festivals and rituals. Their inability to fully participate in community life leads to a breakdown of social relations.* (Narayan et al 2000, 26)

Their social and psychological deprivations include voicelessness, powerlessness, dependence, exploitation, vulnerability, social exclusion, humiliation, and lack of social relations. These layers of sufferings indicate that poverty for them is a multidimensional condition that permeates their public, private, personal and emotional being.

2.5 Interrelated dimensions of poverty and well-being

An important feature of the multidimensional approach to poverty is that it provides an opportunity to explore numerous capabilities and possible ways of being, especially from the perspective of those labeled as poor. This perspective opens the human development discourse to potentials to harness new knowledge from the understanding of the poor about their state of deprivation. One such area of new knowledge being provided is how aspects of deprivation and well-being coalesce in their realities.

The capability approach embraces different ways of 'being and doing' and is not limited to human deprivation. In general, that is how some people experience life, they use their capabilities, whether limited or otherwise. For example, a disabled woman might have limited capability in her feet, which is only one aspect of her being, therefore she uses her hands, eyes, mouth and other functionings of her being to experience life and define her reality.

Happiness is a feeling derived from being satisfied. Satisfaction is much more than a feeling; it is a decision to be content with what one has. This satisfaction could include contentment with social status, material resources, relationships, education, skills and a sense of wellbeing.

Material deprivation is sometimes viewed as the basis for other forms of prosperity and desirable states of being. In a discussion on subsistence poverty, status poverty and agency poverty Ci (2013) argues that the possession of social and psychological resources such as social inclusion and self-respect are conditional upon being in subsistence poverty or materially deprived. This argument was made in reference to the 'Mao era' of The People's Republic of China. Ci (2013, 129) notes that:

> *Subsistence poverty made possible participation in a special kind of social life and the formation of a special kind of self – an ascetic self that was based on collective values informed by a communist telos. This communist ascetic self was the only kind of self that was socially valued and allowed to serve as a basis of respect. Far from being a barrier to participation in the normal activities constitutive of this self, lack of individual wealth and possession was valorised in political terms and treated as an enabling or even necessary condition for participation in such activities.*

Ci (2013) focused on the role of collective agency in constructing material deprivation as a positive and aesthetic way of life. He proposes, in reference to poverty alleviation strategies during Mao's China, that 'even quite severe material scarcity, short of the magnitude of a disaster, need not prevent a society from developing a range of social activities that constitute the basis of agency and self-respect' (Ci 2013, 135). The author based his optimism on the premise that agency can be ignited under any condition of collective power aimed at achieving a valuable outcome (Ci 2013).

2.6 Summary

This review of literature on poverty highlighted three areas of significance, the conceptualisation, dimensions and operationalisation of poverty. Firstly, the literature on the conceptualisation of poverty, with a focus on human development research was reviewed from three theoretical paradigms. Across the three theoretical perspectives – absolute, relative and capability – there is general agreement that poverty is the absence of vital human needs. These needs within the paradigms of absolute and relative poverty had a strong emphasis on material deprivation and were mainly decided by the researcher or those in authority, with deafening silence from the poor.

A noticeable shift in the process of defining poverty emerged during the 1990s which was associated with a new paradigm, the capability approach. Two main differences between this new paradigm and the two previous ones are greater inclusion of the poor themselves in defining their poverty and an expansion of dimensions of poverty. Review of the literature on poverty reveals that in its current state there is greater acceptance of social and psychological dimensions, coupled with the more dominant dimensions of monetary and physical poverty. Participation of the poor in describing their poverty and expansion of dimensions has contributed to a broader informational base upon which to evaluate poverty and development. Furthermore, knowledge of the relationships between the dimensions of poverty and valuable functionings appears to have demystified some of the complexities of defining poverty.

The capability approach has indeed broadened the information base for defining poverty and evaluating development, by opening these debates to discussions on a plethora of diverse human beings and doings. This contribution was viewed, by proponents and opponents of the capability approach, as one of its strengths. However, having a broader informational base also poses some operational challenges when using the framework. The openness of the capability approach gave rise to numerous processes for identifying dimensions of poverty and capability, which resulted in new but unstructured data. Some authors have argued that such informality indicates irregularities and ambiguities and could threaten the viability and reliability of the framework. Being aware of this threat, capability theorists have proposed two main procedures – starting with a preliminary list of capabilities and deprivations and following a set of criteria – which could minimise the viability and reliability threats.

In spite of these cautionary propositions, the application of the capability approach continues to produce new and valuable data, especially new knowledge about the nature and characteristics of poverty. Such knowledge is fundamental to unlocking some of the complexities of and pathways to alleviating poverty.

Additionally, the actual process of uncovering this knowledge is beneficial to the poor themselves. To date, no other paradigm has such potential to deliver these benefits to the poor. The contributions of the capability approach to the debate on human poverty and development outweigh its limitations. Furthermore, the application of the capability approach indicates that defining poverty is an evolving process and its limitations are not an end to the process but a means that has secured the participation of the poor themselves in the debate about their lived experiences and aspirations.

Poverty is one of the most debilitating human conditions and although people living in poverty do their best to survive in that condition, it is a fact that their ultimate need and desire is to change their situation by actually getting out of poverty, as illustrated in Banton's song about poverty in Jamaica. Development is generally put forward as the solution to help the poor change their condition. As stated earlier, the following chapter outlines the theoretical foundation for an alternative perspective to the current development approach that is being used in Jamaica.

Chapter 3. Theorising Human Development

3.1 Human development and its predecessors

The previous chapter outlined how poverty is characterised by a plethora of dimensions and indicators which are woven together in complex relationships. Finding solutions to the problems of poverty presented by this complex matter requires a dynamic approach through the transformational processes of human development that facilitate 'enlarging people's choices' (UNDP 1990, 1). This concept of human development was advanced by Mahbub ul Haq, Amartya Sen and a team of scholars at the United Nations Development Programme (UNDP) in the 1990s. A central concern for putting forward an alternative to the then dominant economic model of development was that people as human beings are diverse and dynamic and cannot be evaluated by only one aspect of their being, that of producers of income (UNDP 1990). The authors emphasise that economic development was a narrow way of seeing and understanding human well-being (UNDP 1990).

Thus, through the UNDP and its Human Development Reports[1], ul Haq and other authors have made a theoretical and empirical contribution to the development literature at the global level (Sen 2010). First, they did this by adding to the material dimension, the social, political, spiritual, psychological and physical dimensions of being human. Development factors, namely, education, decision-making at the individual level, health, freedom of choice and religion, resilience, autonomy, leisure, cultural activities, participation in democratic events, safety, decent and stable work, and respect, among others, have come to occupy a greater part of the development discourse.

Secondly, a measure of human development, which is the human development index (HDI), was created to assess and track progress at the regional and global levels. For the purposes of measurement the HDI in the 1990s assessed health, education and income and ranked countries and regions accordingly, with the rankings being low, medium and high levels of human development. Sceptics and proponents alike agreed

[1] The Human Development Report was first published in 1990 by the UNDP and since then has been published annually. See http://hdr.undp.org/

that the HDI was more advanced than the previous unidimensional measure of gross domestic product (GDP) (Ranis, Stewart and Samman 2006; Grimm et al. 2008; Sen 2010). Measurements of human development have changed within the UNDP over the years and currently include, among the standard HDI, gender inequality index (GII), inequality-adjusted HDI and multidimensional poverty index (MPI) (Giray 2014; Rahi 2011). Based on the concept of expanding options that promote well-being, other catalysts apart from the HDI and its variants include the sustainable development goals, which were formerly known as the millennium development goals (UNDP 2016).

In spite of their adaptability, a longstanding critique of these indices is that they would be more relevant in assessing the dynamic nature of human development if they were to be context specific. In fact, Mohammed (2000), Ranis, Stewart, and Samman (2006), and Grimm et al. (2008) added other indicators in order to provide a more nuanced perspective of well-being at the regional and national levels. Mohammed (2000) argues that even though the HDI is a useful guide it is an inadequate tool for judging 'meaningful and worthwhile' choices at the individual level, which is the building block of every society. Mohammed (2000), Innerarity (2000)and Bailey (2004), among others assessed the state of human development within Jamaica using the HDI framework. From a gender perspective, they concurred that it would have been more relevant if the HDI was able to signify the real ways in which the development process occurs at the local level.

As the work of the UNDP evolves, it seems to reflect more features of Sen (1999a) theoretical framework of the idea of development as freedom. This framework is outlined in the next section of this chapter. The 2016 Human Development Report has adopted Sen's (1993, 1999a) analytical perspective which argues that functioning, capability and agency are central to development as freedom (UNDP 2016).

Even though the concept of human development has changed over the years, its theoretical foundation was far less humane and can be traced back to geopolitical economics of the 1940s. Back then it was modernisation theory in practice for the First World, now referred to as developed countries. Modernisation theory refers to the ideal

of economic development and industrialisation as effective pathway from traditional society to modern society (Ake 1993; Schech 2000).

During the same period there was a progressive movement by the Third World, now referred to as developing countries, away from colonialism to independence as they aspired to improve the quality of life of their citizens and better position themselves in the global political system (Ake 1993). Colonialism, according to (Horvath 1972, 46), is 'the control by individuals or groups over the territory and/or behaviour of other individuals or groups… A form of exploitation with emphasis on economic variables… and a culture-change process…'

Ake (1993) believes Rostow (1959) stages of economic growth was the main vehicle of modernisation. Rostow (1959) hypothesises five stages of growth which he believes can transform a society from traditional to modern. First, to achieve modernisation a society would need to embark on a phase of sustained industrialisation, which would result in rapid growth in sections of the society. With these two stages underway, the society would then move onto maturity, wherein further expansion of industrialisation would take place on a larger scale. In the fourth stage a society would have reached the age of mass consumption and would then be able to choose to either increase expansion of social conditions for its people, promote consumption expansion, or spread its control of power to other societies. In the final stage, the society would have moved beyond fetishism with goods and services and become open to choices of a wide range of revolutionary options. Traditional or underdeveloped society, according to Rostow (1959), lacked most of the outcomes of the stages as well as possessing micro-level psycho-social weaknesses.

Schweinitz (1972)1972) criticises Rostow's stages as being arbitrary with a strong undertone of political expedience instead of being based on rigorous economic analysis. Rostow (1959) himself admitted that the stages were arbitrary and based mainly on historical observation. Still yet, one of the most influential interpretations and criticisms of modernisation theory was put forward by Andre Gunder Frank (1969, 1970). Frank (1969) rejects the argument of Rostow (1959) and others that underdeveloped societies were caused mainly by the problems of lack of growth, shortage of capital, weak institutions and an unstructured economy. Frank's (1969)

counter claim, known as dependency or underdevelopment theory, situates an imbalanced relationship and power dynamics between developing and developed countries as the root of underdevelopment in developing societies. His arguments further outline how inequalities in trade and financial arrangements were the main factors contributing to such polarity in international relations.

Beckford (1972a) endorses Frank's (1969) perspective of dependence and its negative impact on national development in underdeveloped societies and expounds on that idea of development. From that viewpoint, Beckford (1972a) asserts:

> *Genuine independence – that is, the full freedom of a people to control the environment in which they live and to manipulate that environment in any way they desire… I feel certain that all people wish to be independent. To have to be dependent on others is dehumanising.*

He suggests that only a revolutionary transformation would be able to yield the desired outcomes of development because of the complex structure of underdevelopment. This transformation, he suggests, begins with changes in the mind-set of individuals and governments in developing countries. With the new mental model, societies would then create the following opportunities under the guide of public policies. At the international and regional levels governments would nationalise ownership of land and assets, coordinate international groups and regional economic integration and regional research and development institutions would become integrated. At the national level, it would require a new group of political leaders and social arrangements, land reforms, food rationing, and creation of secure marketing, government interventions for the people and not led by external forces, production and financial facilities, nationalise foreign-owned financial institutions, and institutionalise local financial practices. At the local level it would be an imperative to promote a willingness to participate in the changes, a sacrificial disposition, and high tolerance of discomfort in pursuit of economic development.

These transformations, asserts Beckford (1972a), would require national consensus. He believes the agriculture sector has great potential for development that could ignite the transformation process (Beckford 1972a). The author further argues that underdeveloped societies can enhance the benefits of agricultural advancement

through technological innovation, as long as it is appropriate for local resources and endorses the valuable aspirations of local individuals and groups. In a later contribution Beckford (1974) reiterates that a change in the mind-set of people of former plantation societies is a prerequisite for agricultural development as an engine of national economic growth. He envisioned economic growth as a means to development and affirms that 'this material advancement can be satisfactory only if it preserves the quality of life that people regard as important' (Beckford 1972a). Theoretically, Simon and Ruccio (1986) along with Ake (1993) argue that dependency theory suffered from methodological limitations that diminished it into simply an ideology that was almost impractical from a scientific standpoint.

With the continuing debate between modernisation theorists and dependency theorists, new approaches brought a noticeable change in the body of literature regarding the practice of development during the 1970s and 1980s. The World Bank began providing loans to developing countries, mainly for the purposes of attracting new capital and also to help these countries pursue their aspiration of improving the well-being of their citizens (Reid 1973). Some authors have argued that globalisation, as a modernisation strategy, was institutionalised in the World Bank and the International Monetary Fund (IMF) (Babai 1993; Veltmeyer 2009). According to (Kaplinsky 2001, 46) 'globalisation is a multifaceted process and can be characterised as a systematic decline in the barriers to the cross-national flow of products, capital, people, values and ideas.'

The World Bank is a financial institution. It was initially conceived of as the International Bank for Reconstruction and Development (IBRD) for the role of rebuilding European and American economies (Berger and Beeson 1998). In 1944 the main architects of the Bank created it as a strategic mechanism that would enable the economies of the first world to recover from the losses that resulted mainly from World War II, The Great Depression, and as a means to stave off the threat of communism (Babai 1993). The International Monetary Fund (IMF) was created at the same time, for similar purposes (Babai 1993). Ideologies of the modernisation theory underpin the work of these financial institutions. According to Clark (1981) as well as Berger and Beeson (1998), the World Bank especially, has been somewhat flexible in its practice of some aspects of the economic growth.

Numerous studies in the development literature have criticised the work and structure of both institutions but mainly the World Bank. Ongoing criticisms relate mainly to its practice and promotion of economic growth. Internal critiques such as Stiglitz (2008) argue that the approach of the Bank in its distribution of official development assistance (ODA) to developing countries is exploitative. Numerous authors have claimed that the negative effects of the lending policies, especially the structural adjustment policies (SAP) of the 1970s, 80s and 90s, have been the most enduring legacies of the Bank (Handa and King 2003; Clarke and Howard 2006; Patterson 2009; Black 2001). The structural adjustment policies determined conditions under which developing countries agreed to borrow loans, and some of those conditions were related to the privatisation of government-owned enterprises to increase revenues, reduction in social expenditure to stabilise national budgets, import liberalisation and an increase in minimum wages through privatisation (King 2001). However, King (2001) evaluated the economic reform process, which includes the period of structural adjustment policies, over four decades (1950-1990) in Jamaica and levelled some of the blame on the Jamaican government. He argues that lack of commitment, slow implementation and reluctance on the part of successive governments contributed to some of the negative outcomes of SAP, as experienced by the Jamaican population.

Lyons and Titus Msoka (2010) observe that modernisation theory and its economic principles are strongly engrained in the work of this financial institution. Similar views were echoed by (Bazbauers 2014, 91) who argues that in spite of several crises in the global economy the World Bank has shown no practical signs of changing its 'development mindset' of modernisation through economic growth.

In general, critics question the ability of modernisation theory to provide adequate development strategies for developing countries. Authors such as Handa and King (2003) and (Patterson 2009) emphatically argue that attempts by the World Bank to address the unintended negative consequences of its narrow focus on economic growth as development, have been ineffective. Using empirical evidence from Jamaica, the authors reveal the negative impact of the structural adjustment policies of the World Bank and IMF on the social, physical and economic potentials of the poor. Handa and King (2003) note that countries like Jamaica with high debt, have to divert more than

half of its national revenue away from local social and economic development priorities to service loans of the IMF and World Bank. However, King (2001) found that the unwillingness on the part of national governments to effectively implement the reform programs have contributed to some of the negative effects of the structural adjustment policies.

Economic development emerged, from the literature review undertaken for this research, as the most dominant feature of development. Yet it must be acknowledged that theorising human development is not the prerogative of only economists. Feminists have made a substantial contribution to the development debate (Boserup 1970, 1990; Antrobus 1989; Moser 1993). Feminism as a critical theory has a parallel evolution to the development discourse since it began mainly as a critique of stereotypical development ideals about women. Three of the approaches regarding development strategies for women were the move from women in development (WID), to women and development (WAD) and then to gender and development (GAD) (Koczberski 1998). WID was concerned with integrating women into prevailing development initiatives without assessing their actual needs and desires (Koczberski 1998). Their needs and level of participation were prescribed and generally controlled by development agencies and associates since the 1970s. During this period feminism had a strong emphasis on deconstructing woman, gender and identity in order for women to gain control of their lives and to reconstruct and tell their stories (Bammer 1991).

WAD follows similar argument as that of dependency theory and critiques the power relations between patriarchy and capitalism. Conversely, GAD emphasises the beneficial link between women and men as partners in the development process (Antrobus 1993). Barriteau (2003a, 5) believes unequal power in gender relations and patriarchal practices, manifested in social arrangements and institutions is the source of the 'material and ideological subordination' experienced by women of colour. Therefore, she proposes that '[given] knowledge represent[s] a critical source of power… Creating new knowledges through building more meaningful feminist theoretical constructs,' (Barriteau 2003b) as a solution to the subordinate position of women of colour.

Development theory and practice mainly take an interventionist approach to the needs of women and the opportunities they desire and pursue. This was reflected in the WID, WAD and GAD approaches of the 70s, 80s and 90s. They all subscribed to a normative conceptualisation of women, especially those in developing countries, as a homogenous group of victims to be rescued. This partial vision of women in general has had sustained criticisms over the decades from diverse feminist groups and others. The main concern of the feminist movement was the lack of freedom to express feminine diversity in relation to their reproductive and productive functionings and opportunities as well as their community influence at the local, national and international levels (Boserup 1990; Massiah 1990).

Although the body and mind of the woman remain areas of socio-economic political contestations, (Bammer 1991) was optimistic about the role of feminism in bringing about positive social change in the years to come. Her hope was built mainly on the 'feminist consciousness-raising' of the 1970s and grounded in the unfinished 'revolution' needed to address the existing:

> *Feminisation of poverty – the growing number of women, particularly women of colour, who are unemployed or underemployed, often single heads of households, often with no or inadequate housing or health care…* (Bammer 1991, 155)

The current feminist literature indicates a state of peaceful coexistence between feminism and development theories unlike the evidence of polarity in the literature of the 70s, 80s and even 90s. (Prügl 2017) reveals that the field of development now reflects more of the real gender issues for which women, as well as men, continue to advocate, such as equality in the family, acknowledgement of the role and contribution of women in the development process and a broader platform to discuss development issues pertinent to women.

Modernisation theory with its strategy of globalisation, and even its main critic, dependency theory, all focus on economic growth and how best to increase it at the state level. Hence, economic growth as development was espoused as the solution to poverty and underdevelopment for the latter part of the 20th century. At the turn of the 21st century development literature provided an alternative perspective which shifted the focus away from macro-economic development led by the state to a people-centred

human development with the state playing the role of facilitator. One of the main contributors to this renewed focus on individuals as the centre of development was economist, philosopher and Nobel Laureate Amartya Sen (1999) with his seminal work on the capability approach.

Before delineating the capability approach, it is important to state that other development economic theorists have put forward more balanced arguments than those of Rostow (1959) and Frank (1969). One of those theorists whose work appears to be an enduring legacy (UNDP 2012; World Bank 1999) of earlier development thoughts is William Arthur Lewis, a Caribbean economist and Nobel Laureate. main contribution to the theory of development was based on a solution to the problems of economic stagnation in developing countries. The solution he pioneered was that in a context of excess labour in low-income sectors, such as rural regions, that surplus could be transferred to sectors with higher income. Over time employment and production would increase, thereby contributing to increase in national income. In the long-run the excess labour would decline but wages would remain relatively high as the society moves from a dual economy to an integrated society with high wages and sustainably high productivity. While some developing countries have benefitted moderately from his model, the reluctance of some governments to create an enabling environment to support the model was viewed as a development impediment (Figueroa 2005; Girvan 2005).

In Lewis (1955) seminal book, *Theory of Economic Growth*, he discusses the human behaviours that directly and indirectly cause growth. Expansion of knowledge, capital accumulation and economic activities were discussed as the direct factors. He then conducted a historical analysis of the institutions, beliefs and psycho-social environments that have both positively and negatively influenced economic growth at the global level. Yet one of the underlying questions that Lewis (1955) grapples with throughout the book is the question of how desirable is economic growth. It could be argued that this provocation was due in part to his varied experiences with developing countries' governments whose aspiration was:

> *The abolition of poverty, illiteracy and disease, but* [who also] *cling desperately to the beliefs, habits and social arrangements which* [they] *like, even when these are the very cause of the poverty which* [they] *deplore.* (Lewis 1955, 430)

Lewis (1955) observed that even though several direct factors impeded development in these countries, it was the indirect factors such as their value systems and psycho-social environments that though appearing to be subtle had an enduring impact on their level of development.

In a reasoned and non-judgemental approach he outlines some of the costs and benefits of economic growth. As part of his argument Lewis (1955, 420) declares that, 'the advantage of economic growth is not that wealth increases happiness, but that it increases the range of human choice'. This perspective on the role of development was echoed by Sen (1999a) and was implied in the discussions of Rostow (1959) and (Beckford 1972a). The process of development, according to Lewis (1955), includes advantages, disadvantages, changes and trade-offs. Another claim shared by Lewis (1955) and Sen (1999a) is that the values held within a society can greatly influence the development process.

Lewis (1955) discussion on the advantages and disadvantages of economic development can be viewed as an attempt to provide a more balanced perspective of a dominant theoretical and practical ideology at the time. Some of the advantages of economic growth at the individual level are, being able to have greater control over one's environment, access to multiple choices, freedom of choice in leisure and goods needed for well-being, reduction in labour-intensive jobs, and access to better services, goods and leisure. He also notes that morally, individuals might cease such excesses as opportunities to help the poor and vulnerable. Additionally, he suggests that economic growth could help to balance resources with aspirations, especially in societies where the latter exceeds the former. Lewis furthers his argument by describing how the advantages of economic growth may be of great benefit to women because it could improve their reproductive and productive functions through advanced technology. He indicates that those improvements in the quality of life women may possibly have multiplier effects because:

> *In the process woman gains freedom from drudgery, is emancipated from the seclusion of the household, and gains at last the chance to be a full human being, exercising her mind and her talents in the same way as men* (Lewis 1955, 422).

The disadvantages of economic growth, as noted by Lewis (1955) include mental disturbance, insecure social arrangements, exacerbated social tensions, and the potential to promote dictatorship, conflict and war. He believes economic growth is more strongly associated with the hoarding of material possessions and negative power than the actual virtue of economy, which is the efficient use of available resources. The process of acquiring wealth, especially in excess, may retard social and spiritual well-being and weaken social systems. He points out that some individuals and societies may view reasoning, which is one of the tenets of economics, as a threat to authority and established norms and behaviour. Some may also associate production expansion with less independence, less control over skills, creativity and outputs, as well as with unjust reward for work. He further notes how others associate large scale production with inflexible work rules, schedule and monotonous activities and limited use of their creativity.

According to Lewis (1955), in order to achieve development in developing countries numerous trade-offs and disruptive transformation of values, habits and institutions are of central importance. He believes these strategies should be included in a model of development because of chronic poverty, the presence of adaptive preference, along with observed costs and benefits of economic growth.

Sen (1999a), like Lewis (1955), agreed on the centrality of value in the process of development, but while Lewis (1955) argues for transformation of values to create a more enabling environment for the expansion of economic factors, Sen (1999a) proposed a more nuanced approach. He argued for an evaluation of what people value and why they value what they have, partly to better understand their real processes and opportunities for development, as well as to give recognition to other means of well-being apart from economic growth. While the solutions might achieve the same outcome, the approach put forward by Lewis greatly depends on the willingness of the government to act, which doesn't always happen in a timely manner (Lewis 1955; Figueroa 2005).

3.2 Capability approach: Concerns, claims and evidence

Sen (1999b) broke with traditional development ideology by questioning the value of economic growth as a means to achieve the real ends that human beings desire. In the

context of human development, his main concern with economic essentialism was that monetary variables were inadequate measures of human well-being. This is because, according to Sen (1993; 1999a) income is just one of the many means that individuals convert in their pursuit of the quality of life they value. This concern supports his earlier criticism of economic development theories which he examined and found to have had implicit and explicit generalisations that overlooked inherent human diversity (Sen 1979). Sen (1979) believes the limitations of economic essentialism and making human heterogeneity invisible inadvertently contribute to inequality and injustice and therefore fail to enhance human flourishing in general. The capability approach, he argues, addresses these two weaknesses of economic development.

First, regarding recognition of human diversity, (Sen 1993, 30) points out that plurality is embedded in the very definition of capability – 'a person's ability to do valuable *acts* or reach valuable states of *being*' (author's emphasis added) – with the common use of open concepts to accommodate various *acts* and *beings*, which are different from the specific terms, such as income, wealth and goods, used in the other viewpoints. On this matter of making human diversity visible within the context of human flourishing, he argues:

> *Human diversity is no secondary complication (to be ignored, or to be introduced 'later on'); it is a fundamental aspect of our interest in equality… Sometimes, human diversities are left out of account not on the misconceived 'high' ground of 'equality of human beings', but on the pragmatic 'low' ground of the need for simplification. But the net result of this can also be to ignore centrally important features of demands of equality* (Sen 1992, xi-1)

Second, Sen's (1979, 1999) concern with the problem of devaluing other forms of human development builds on the first argument about human diversity. He posits that if humans are inherently different in their acts and beings which contribute to human flourishing, then the argument that individuals have different valuable acts and beings should be beneficial to the debate on human development. In other words, if an act or being contributes to the development of an individual or group then the expansion of those acts and states of being should be the goal of development initiatives; and if they are not valued or facilitated then within the capability paradigm that could result in deprivation. Essentially, the construct of the capability approach makes 'room for a

variety of human acts and states as important in themselves. It also makes room for valuing various freedoms – in the form of capabilities' (Sen 1993, 33).

Based on the above key arguments about human heterogeneity and ranking of valuable functionings, Sen (Sen 1992, 1999a, 2009) makes three important claims. One is that the capability provides a broader informational base upon which to evaluate the state of human progress than a monetary focus. For example, issues of psychology are often discussed external to the field of human development but (Pick 2015) extended their psychosocial analysis of several development programs in Mexico by looking at deprivation and development through the lens of the capability approach.

Pick and Hietanen's (2015) study found that the freedoms of program participants were restricted by psychosocial barriers such as shame, guilt and fear. Sen refers to freedom in terms of process and opportunity, wherein individuals have uninhibited choices of action and decision, and real opportunities to pursue and achieve those desired actions and decisions within their own environment (Sen 1999a). Pick and Hietanen (2015, 22) state that 'shame, guilt and fear serve as psychological barriers to decision-making and to actual behaviours, thus limiting an individual's potential to make choices and to act upon them'. From their examination of social arrangements in Mexico they observed that social cohesion and social networks were valuable ends and in order to protect these social capabilities it was common practice to give up aspects of psychological freedom, consciously or unconsciously. While it could be argued that a form of freedom is being promoted, recognition of the process by which this is being done does not amount to an expansion of substantive freedoms that promotes other freedoms. This is the ultimate end in Sen's (1999) argument for human development as freedom.

Another Latin American author who has made significant contributions to the capability approach is Tonon (2017). This author focuses on the macro relationship between communities and capabilities, as she acknowledges the changing dimensions of well-being at the individual level and the impact of those changes on the structure of communities. The indicators for community well-being are similar to those for subjective well-being at the individual level, such as economic independence, access to services and resources, leisure, social activities, among others. Even though this

work is specific to Latin America, the multiplier effect of enhancing community well-being and its impact on individual capabilities is salient to this study and provides another pathway through which individuals can address their capability deprivation and in turn expand the social, psychological and economic capabilities of the community.

Acknowledgement of a tension between social and psychological freedoms, which restricts human flourishing, is outside the scope of most theories of economic development. Another study that highlights the benefits of the capability space compared to that of the monetary space is the Yawuru Wellbeing Survey project in Western Australia. In this research (Yap 2016) reported health and material wellbeing along with connectedness to family, community and country, as well as self-determination as valuable capabilities for the wellbeing of Yawuru people in Western Australia. Yet the report stated that these indicators, especially the latter, are frequently absent from policy formation and evaluations regarding the social and economic development of this group of people (Yap 2016). These empirical studies provide evidence that evaluation conducted with a broader informational base, rather than unidimensional monetary measurements, can enhance knowledge on human behaviour and well-being.

A second claim of the capability approach is that diverse reasonings through public deliberation are beneficial in judging how to reduce deprivation as well as serving to promote the advancement of human development (Sen 1992, 2009). In relation to this claim, Sen (2009) further explains that critical reflection and scrutiny of outcomes is a common feature in the evaluation of human progress across and within societies. Some of the main capability theorists – Nussbaum (2003); Robeyns (2003); Alkire (2007a) – endorse public deliberation, mainly in the process of selecting capabilities. Although Nussbaum (2003) recognises the importance of open debate on matters of public interest, she recommended that such a process should take place after the drafting of a preliminary list of capabilities. Robeyns (2003) and Alkire (2007a) differ and argue that the open debate should be part of the process of selecting such list.

Alkire (2007a) further notes that public deliberation can contribute to policy evaluation, create opportunities for consensus in cases of conflicting values, as well as

enhance legitimacy and authority of agreed priorities and could even build trust among those participating in the discussion. The author points out that within the context of public discussions disadvantaged individuals and groups could find opportunities to respond to internal challenges and deprivations as well as advocate for redress to injustices they have experienced. In terms of the role of public reasoning in promoting development, Alkire (2007a) cites cases in which public debates have contributed to greater accountability and higher levels of collaboration to facilitate the rights of citizens in many countries.

The third claim is that evaluation of human development as freedom must include assessment of the actual development process instead of emphasising goals and outcomes (Sen 1992, 1993, 2009). What people do during the process of achieving various freedoms, such as the trade-offs they made, strategies employed and what opportunities were effective, are more persuasive evidence for policy making. Participation in the development process influences capability expansion in ways that may not be reflected in outcomes. For example, Dreze (2002) observed that expansion of the capabilities of women to achieve formal education and to become economically independent were significant contributors to reduction in fertility rates. The authors state that a focus on outcome might have obscured this internal connection between education, income and fertility rates.

Within the capability paradigm, functioning, capability, freedom and agency are the central components of development (Sen 1993, 1999). Functioning refers to 'the various things that she or he manages to do or be in leading a life', (Sen 1993, 31) it's simply a range of achievements. Capability is 'a set of vectors of functionings, reflecting the person's freedom to lead one type of life or another' (Sen 2007, 417). It is a set of other things that the individual can achieve, a range of alternative choices that are achievable and reasoned to be valuable. Furthermore, capability encompasses 'the person's freedom – the real opportunities – to have well-being… well-being freedom' (Sen 2007, 417). However, if that quality of life is substandard then even though important, those functionings are inadequate to achieve the end of human development – advancement of human existence. One option to those functionings is to assess the personal and social environment to identify if the individual has other choices or other ways of being and doing – a capability set, meaning what else is she

or he able to freely do and be. Freedom has to do with how enabling or disabling are the opportunities and processes within the environment of the individual, especially the personal and social environments. It is within contexts of freedom, such as one's personal and social surroundings, that agency is most influential or is strongly suppressed. Agency as a feature of development, according to Sen (Sen 1985, 203) is 'what the person is free to do and achieve in pursuit of whatever goals or values he or she regards as important', whether or not they adhere to national or international standard.

However, Sen (1993, 2009) cautioned that those alternative choices are dependent on the freedom the person has to pursue those options. Sen (1999) posits that a good starting point for the identification of freedom is to evaluate the processes and opportunities accessible to the individual to achieve those additional doings and beings that she or he values and has reason to value. It is claimed that the presence of those processes and opportunities will contribute to the advancement of valuable human existence. The processes and opportunities may differ for each individual and society, although commonalities can be identified through public deliberations. Sen (1999) recommends that a focus on evaluating the processes and opportunities people have to pursue valuable life choices is a good starting point in understanding the level of freedom or development within a given society. He believes actual processes and opportunities are means, like monetary resources, which can expand real freedoms that people value and have reason to value (1993).

3.3 Evaluating freedoms

Freedom within the capability paradigm is embodied in the individual and is both a means and an end of development. Development relates to freedom in the negative and positive (Gray 2007). Freedom in the negative can be the removal of restraints whereas further progress requires the elimination of un-freedoms and deprivations, which is just one aspect of negative freedom (Sen 1999; Gray 2007). Positive freedom speaks to the inherent ability of the human to choose to act in a beneficial manner that promotes and reinforces other expressions of freedom. Sen (1999) focuses on five instruments of freedom that he believes can address both negative and positive freedom and thereby enhance development. They are economic opportunities, political freedoms, social facilities, transparency guarantees, and protective security.

Freedom has two important roles in the overall state of development within the capability paradigm. First, more freedom allows individuals to build useful functionings, which can help to achieve valuable outcomes. The state of development within a society can be measured by these outcomes. As mentioned earlier, Sen (1999) suggests a historical evaluation of valuable outcomes, processes and opportunities as a preliminary guide to a better understanding of current freedom within a society. Second, individual creativity and social virtue, in the form of agency, thrive in the context of freedom. Sen (1999, 18) believes that 'greater freedom enhances the ability of people to help themselves and also to influence the world, and these matters are central to the process of development.'

Sen's (1999) interpretation of development as freedom is consistent with other thinkers who examine politics, society and progress. One such thinker is Nikolas Rose. In his book, *Powers of Freedom: Reframing Political Thought*, Rose (1999), like Sen (1999), hypothesises freedom at the level of the individual within social and political systems. However, Rose (1999) was not as constrained as Sen (1999) in his conceptualisation of freedom. He views freedom as 'the act of liberation from bondage or slavery, the condition of existence in liberty, the right of the individual to act in any desired way without restraint, the power to do as one likes' (Rose 1999, 62). It could be argued that Sen's (1999) moderate viewpoint of freedom was influenced by his emphasis on instrumental freedom, which essentially resides outside of the individual. To Sen's (1985) credit however, his discussion on agency freedom is similar to Rose's (1999) substantive freedom. Although Rose (1999) discusses both instrumental and substantive freedoms like Sen (1985, 1999), his elaboration of substantive freedom can help to furnish aspects of the 'open conditionality' found in agency freedom, as put forward by Sen (1985, 204). One key aspect of the 'open conditionality' that was expounded by Rose (1999) is the possibility for the agent to envision and employ freedom as a tool that can be used to further or even complete the process of development as an end. Seeing freedom as a critical tool in the process of development is a cogent argument for individuals in developing countries, since the threat of squandering valuable freedoms is an imminent danger even in developed countries (Rowntree 1941).

First of all, Rose (1999) believes freedom is an innate human quality. He states that 'human beings are, in their nature, actually, potentially, ideally, subjects of freedom and hence that they must be governed, and must govern themselves, as such' (Rose 1999, 62). Individuals express that innate freedom through autonomous actions, identity, rights, employment, consumption, and in other ways. At the level of the individual those expressions, according to Rose (1999), are *modus operandi* and not mere abstract concepts. It means that the individual has some level of control to choose to function freely or act suppressed in whatever environment or circumstance present. The author posits that a 'recognition of freedom as a set of practices, devices, relations of self to self and self to others…, opens freedom itself to historical analysis and historical criticism' (Rose 1999, 94).

Before moving to such historiography, the author suggests a non-judgmental stance as a prerequisite. Specifically, one must 'deprive oneself of the opportunity to use the value of freedom as the basis for critical judgement' (Rose 1999, 95). In other words, commit to viewing the deprived or enslaved person as a free agent. From that unbiased perspective, Rose (1999, 97) argues that it is then possible to have a different view of the lived experiences of those categorised as deprived. To do so one has to:

> *Positively value all stratagems, tactics and practices that enhance human beings' capacities to act; correlatively it would subject all that reduces such capacities to critical scrutiny. Further, it would evaluate practices in terms of the extent to which they accord those caught up within them the capacity to judge, accept or transform the practices that subjectify them.*

The author believes historiography would be responsive to this perception of freedom. Such evaluation would entail examining:

> *The ways in which freedom was put together historically, and the practices which it entails in the present…ways of practicing freedom that did not fix us through a hermeneutics of identity, did not entail the forlorn attempt to consume our way out of our dissatisfactions, but were open, inventive and questioning…ways of organising our concerns for others that did not seek to set them free – relations of obligation, of commitment, perhaps evoking an older sense of care. It would help us to calculate the costs of being what we have become; hence it might allow us to invent ways of becoming other than what we are* (Rose 1999, 97).

For the purposes of evaluating freedom it is imperative to note some of the discussions regarding the freedom within the policy context. Carter, Kramer, and Steiner (2007)

acknowledge that freedom is complex with multiple dimensions which are generally mutually dependent. They point out that freedom has been of great interest throughout human civilisation mainly because even though it's valuable, the pursuit of some kinds of freedom can diminish other freedoms and those of other individuals and societies. Laws and policies therefore became mechanisms of social discipline approach useful for the balancing of freedoms, to keep freedom within boundaries because of what is perceived as its natural tendency to override other freedoms. Throughout human history these mechanisms, the authors argue, have been misused, noting that 'what virtually all restrictions have in common, is that their presence forecloses some possibilities of acting and opens up others' (Carter et al. 2007, xviii). This line of argument echoes that proffered by Rose (1999) that freedom is an inherent human quality and must therefore be treated as inalienable, that which cannot be taken away even when suppressed or deprived. Carter and co-authors (2007) believe such mutation of freedom is possible partly because freedom is influenced by several factors such as value, motivation, violation, coercion, interconnectivity, and ranking, among others.

The authors recommend that this associated ambiguity regarding freedom should not result in retreat, as is the usual response, but could rather be addressed through public deliberation to clarify the specific freedom to be pursued and the dependent freedoms that will support that pursuit. This response, they believe, can help to achieve consensus on the way forward.

Carter and co-authors (2007) added that some freedoms might appear to be irrational in this context of an open debate because 'judgements [of] whether a person is free or unfree – or more or less free than another person – rest on reasons of various types, which differ from one conception to another.' They reiterate that it's the presence of these multiple reasons why pubic discussions are even more significant. Similarly, Sen (1999, 2007) promotes the value of public discussions in these contexts, which could also be evaluated as an expression of freedom.

3.4 Critiques of the capability approach

Even though Sen's capability approach was received with great optimism (Robeyns 2003; Alkire 2007), like other development pioneers such as Booth and Rowntree, he did not provide a formula for the selection of a list of dimensions. In fact, some of the

earlier critiques of the capability approach were premised on vagueness of several aspects of the approach, including the absence of a clear selection process for a list of dimensions of poverty and capability (Cohen 1990; Nussbaum 2003; Gasper 2007). Although Nussbaum (2003, 2011) endorses the liberating and human-centred underpinnings of the capability approach, she criticises it for being too open due to the absence of a prescribed set of minimum capabilities or at least a list with the most important dimensions. In responding to this critique, Sen (2004) argued that the starting point for examining capability deprivation or development as freedom should not be a prescribed list, mainly because such a list would undermine human heterogeneity and public reasoning, which are fundamental tenets of the capability approach. In his response he stated:

> *Pure theory cannot "freeze" a list of capabilities for all societies for all time to come, irrespective of what the citizens come to understand and value… There is also the problem of determining the relative weights and importance of the different capabilities included in the relevant list… To insist on a fixed forever list of capabilities would deny the possibility of progress in social understanding and also go against the productive role of public discussion, social agitation, and open debates* (Sen 2004,78-80).

Another concern about the approach that has received much discussion is that given the strong emphasis on reasoned valuation of the poor in the selection of capabilities, it is possible for those capabilities to be tainted by adaptation to deprivation. It is this threat of downward adaptation that is implied by Gasper (2007) who points out that tensions exist between reasoned valuation and prioritising capabilities. He further notes that those theoretical tensions become more problematic during operationalisation. Along with those tensions and threat, the current embryonic state of capability prioritisation, he argues, exposes the approach to distortion and inappropriate reduction.

Robeyns (2006) earlier identified distortions in the use of the capability approach. Gasper's (2007) concerns about adaptation is a real threat as evidence of adaptation was found in the study by Austin (2016). She reveals that in fact adaptation influenced the reasoned valuation of citizens in Britain during economic crisis. In her study she argues that such a cognitive outcome resulted in 'a diminishment of internal capability, and therefore shrinkage of the combined capability set' (Austin 2016, 17). Inclusion

of aspirations in the selection of capabilities and other forms of valuation such as open debate on the conception of valuable outcomes and capabilities were recommended as strategies to minimise the distortive effect of downward adaption on capabilities (Gasper 2007; Austin 2016). However, it is important to acknowledge the fact that adaptation is a normal human response and is therefore an ever-present danger in the application of the capability approach (Sen 1985). Downward adaptation is a cognitive process in which individuals:

> *Compare themselves with others who are in the same precarious situation or even worse off; as a result, they lower their expectations and adapt their aspirations and preferences to their material and financial constraints (Crettaz and Suter 2013, 140)*

Within the field of psychology adaptation is 'the process by which a sense organ gradually ceases to respond to a constant stimulus' (Sartain et al. 1973). However, adaptation does not carry a negative connotation in psychology as it does in the field of human development. That is because adaptation is part of the learning process, which is 'the modification through experience of preexisting behaviour and understanding' (Bernstein et al. 2012, 197). It is through learning that individuals build functionings and expand capabilities, either by direct or indirect learning. A balanced perspective of adaptation is essential for evaluating human development and will be useful for understanding how women move in and out of poverty and development. This discussion is in the next chapter.

The current state of the capability approach literature is represented by a wide-ranging body of research which has verified its claim of providing a broader informational base than that of economic growth (Pick and Hietanen 2015; Yap and Yu 2016). Robeyns (2016) outlines that the capability approach is a normative framework that is very effective for evaluations as well as being applied to theory building, comparison of development across societies, policy and law reforms. Several of these studies have justified the framework as an evaluative tool in capability selection at the individual and national levels in both developing and developed countries (Walker, Berekashvili and Lomidze 2014; George 2015; Yap 2016; Buckler 2016; Wilson-Strydom 2016; Hall 2017).

Yet only a few of these scholarly efforts have moved beyond identification of capabilities to explain the role of capabilities in the development process (George 2015; Austin 2016; Hall 2017). Upon surveying this body of literature, another gap was identified. There were limited empirical studies on the interrelationships between various dimensions of poverty and how those connections can add to the informational base regarding the nature of poverty and its influence on the outcomes of development interventions (Walker et al. 2014; George 2015). Furthermore, regarding the proposition of examining processes and opportunities as indicators of development, as discussed above, only a few studies have tested its validity (Biggeri and Ferrannini 2014; Manzanera-Ruiz and Lizarraga 2016; Wilson-Strydom 2017).

3.5 A broader informational base: Adding psychological capability

Overall, in the preceding theoretical debate there was a level of acceptance of the material, social, physical, spiritual and psychological dimensions of development. Yet there is a dearth of studies on the psychological dimension within the capability paradigm. In fact, Alkire (2007b, 353) refers to psychological as one of the 'missing dimensions' needed to better understand poverty and formulate development interventions. It is only recently that capability scholars began in-depth examination of psychological variables (Hart 2016).

The inclusion of a psychological dimension in this thesis was guided by the literature review, informed by the fieldwork and data analysis, and supported by the proposition of the capability approach to include all valuable capabilities in an evaluation of human well-being. This was done for the purposes of having a broader informational base upon which to evaluate the state of being and doing of the research participants. This follows a similar interdisciplinary approach taken by Alkire (2002) in her evaluation of poverty projects in Pakistan, as outlined in her book, *Valuing Freedoms: Sen's Capability Approach and Poverty Reduction*. This multidisciplinary response to the lived realities of individuals and groups goes beyond theoretical application (Robeyns 2003b).

Within the capability framework, psychological functionings and capabilities are generally associated with the agency aspects of human development. Agency as a feature of development, according to Sen (1985, 203) is 'what the person is free to do

and achieve in pursuit of whatever goals or values he or she regards as important.' That person would be an agent, who is 'someone who acts and brings about change, and whose achievements can be judged in terms of her own values and objectives' (Sen 1999, 19). It is within this agency aspect of human development that Marley's (1980) *Redemption Song* finds great resonance. In the main lines, 'Emancipate yourself from mental slavery; None but ourselves can free our minds' Marley (1980) asserts that the agency of the poor has a critical role in achieving a desired mental freedom. Similarly, Freire (1970) in an earlier work ascribed great importance to the active role of the deprived in transforming their condition. Freire (1970) argues that, 'the oppressed can overcome the contradiction in which they are caught only when this perception enlists them in the struggle to free themselves.'

Sen (1985, 203) notes that an understanding of a person's 'aims, objectives, allegiances, obligations and conception of good' can be useful in outlining the role of agency in the development of that person. One of the fundamental claims made by Sen (1985, 187) in favour of a broader informational base, specifically for agency information, is that:

> *Well-being information itself could not capture the important features of agency, or act as its informational surrogate. In fact, some types of agency roles, e.g., those related to fulfilling obligations, can quite possibly have a negative impact on the person's well-being.*

Sen (1985, 1993) maintains that this knowledge about the internal environment is important because, unless the individual has opportunities to judge her or his development trajectory and outcome, then that person, motivated by agency goals, might pursue doings and beings that may be counterproductive (Sen 1985).

Additionally, Sen (1999) argues that it is the agency aspect of the well-being of women that has the greatest potential to bring about more meaningful changes. He notes that while the focus on well-being achievement is essential for women, advancement of their agency goals can be of great benefit to not only women as a group but to children, men and other members of a society. Robeyns (2003) and Nussbaum (2003, (2011) who are feminist theorists have stated that Sen and the capability approach have served to advance the type of development that women value. Development which recognises

and respects women as being equally important in their own right and 'no longer the passive recipients of welfare-enhancing help, women are increasingly seen, by men as well as women, as active agents of change: the dynamic promoters of social transformations that can alter the lives of both women and men' (Sen 1999, 189). Sen's (1999, 1990) stance against the unfavourable conditions and opportunities for the development of women has been positively critiqued by feminists (Robeyns 2003, 2005, 2016; Nussbaum 2011) and remains a large part of his discussion throughout his writings on the capability approach (Sen 1990, 1992, 1999(Dreze 2002).

Alkire (2005) expounded on Sen's (1985) argument regarding the relevance of agency as an important aspect of human development. She did so through a review of several concepts and measurements of psychological capabilities at the individual level, based on studies in the psychology field. The capabilities examined were self-direction, self-efficacy and self-determination along with other secondary level capabilities such as freedom, creativity, independence, curiosity, autonomy, competence, and relatedness, among others. Agency, in the form of psychological capability, she argues, is a critical component of the informational base for evaluating development interventions and other social arrangements. Furthermore, it is her belief that an expansion in one capability could contribute to an expansion in another capability, which could enhance well-being at the individual level. Along the same agency argument as Alkire (2005), but not as in-depth, Robeyns (2003) discusses mental well-being, political empowerment, time-autonomy and respect. Nussbaum (2003) also explains sense, imagination and thought, practical reason and control over one's environment as universal capabilities that are generally valued by individuals.

The most recent research by Manzanera-Ruiz and Lizarraga (2016) is one of the few empirical studies within the capability paradigm on the practical role of agency, or psychological functioning and capability, in enhancing human well-being. This study explained how through shared intrinsic and extrinsic motivation women in the rural district of Soni in Tanzania effectively created women's groups and operated tomato production groups (Manzanera-Ruiz and Lizarraga 2016). The authors note that in spite of the difficulties encountered by the women during the process of formation and production, the outcomes of their action contributed to enhancement of their well-being. Their own actions contributed to reduced vulnerability for poorer women,

greater control over their income, helped to create social security and opportunities, and started the process of judging their individual and group values and aspirations.

Alkire (2005, 245) believes this knowledge gap regarding the psychological dimension of human development within the capability paradigm is due in part to the 'pedantic difficulties' of merging distinct theories of well-being and employing various measures of psychological capabilities. Studies like that of Manzanera-Ruiz and Lizarraga (2016) that use qualitative ethnographic tools to gather self-reported psychological capabilities could be one of the basic approaches used to expand psychological information for evaluating the state of human development. Another starting point recommended by Sen (1985, 203) and noted above, is to explore how the 'aims, objectives, allegiances, obligations and conception of good' held by the individual impact her or his functionings and capabilities. In other words, identify what are the aspirations and how do those aspirations influence the current state of development of the individual. Hart (2016) made an argument for aspiration in the capability paradigm but her work on how to transform aspirations to functioning and capability to influence human development is currently at the preliminary stage.

In relation to converting aspirations or psychological capability to enhance human development there are some theoretical perspectives in the field of psychology that have made some useful contributions. These include Maslow's theory of human motivation, self-determination theory and ecology of human development. Maslow (1943) theorises that human needs can serve as strong motivations for behaviour. These needs he suggests are physiological, safety, love, esteem and self-actualisation. Assuming that such behaviour enhances a meaningful quality of life, identifying needs that function as the strongest motivation could contribute to human flourishing for that individual or group. This outcome is viewed to be beneficial not only because it reduces deprivation, but also Maslow (1943) argues that fulfilment of need in one domain may influence the achievement of other needs.

Self-determination theory is concerned with the psychological and social contexts which facilitate optimal human functioning. (Ryan 2000, 68)believe that fulfilment of the need for competence, relatedness and autonomy is 'essential for facilitating optimal functioning of the natural propensities for growth and integration, as well as for

constructive social development and personal well-being.' They assert that other factors linked with human deprivation can be associated to stymieing of these three inherent psychological functions.

Motivation is viewed as the power behind functionings and capabilities and is valuable to human development because it propels action and behaviour. Various factors motivate individuals and they usually fall in the categories of internal values and external sources. Ryan and Deci (2000, 69) posit that internal motivation 'have more interest, excitement, and confidence, which in turn is manifest both as enhanced performance, persistence, and creativity and as heightened vitality, self-esteem, and general well-being' in most contexts. Given the differences in outcome of internal and external motivation, Ryan and Deci (2000), Deci and Ryan (2010) focus on the actual motivation behind human behaviour. They acknowledge three types of motivation along a self-determination continuum – amotivation, extrinsic and intrinsic motivations. Ways to enhance and preserve extrinsic and intrinsic motivation were discussed, as well as conditions that could disable them. Amotivation is a human condition in which there is a lack of willingness or capability to act or be. Intrinsic motivation is viewed as doings and beings that are stimulated by the inherent satisfaction of the act or being itself; while extrinsic motivation denotes doings and beings that are driven by external or material outcomes (Ryan and Deci 2000).

Intrinsic motivation is a natural human capability that is manifested throughout the life cycle in forms of 'assimilation, mastery, spontaneous interest, and exploration' (Ryan and Deci 2000, 70). These manifestations of internal motivation are means and ends to human satisfaction and they thrive in specific contexts. These environments provide feedback, communications, optimal challenges, effectance-promoting feedback, positive performance feedback, immediate contextual supports for autonomy and competence, choice, acknowledgement of feelings, opportunities for self-direction, and reward (Ryan and Deci 2000). They added that the presence of social security and relatedness enhance intrinsic motivation (Ryan and Deci 2000). Intrinsic motivation, however, tends to diminish in contexts where there are extrinsic rewards, threats, deadlines, directives, pressured evaluations and imposed goals (Ryan and Deci 2000). Essentially, in relation to intrinsic motivation, Ryan and Deci (2000, 71) argue that

‘people will be intrinsically motivated only for activities that hold intrinsic interest for them, activities that have the appeal of novelty, challenge, or aesthetic value.’

Extrinsic motivation greatly impacts human behaviour and development when the stimulus is perceived to be valuable to self. Yet even then the response to such stimulus may vary between ‘unwillingness, passive compliance, and active personal commitment’ (Ryan and Deci 2000, 71). Perception and assimilation are central in the conversion of extrinsic motivation to self-motivation and remain pertinent in the ‘regulation of behaviour across the life span’ (Ryan and Deci 2000, 71). In the self-determination continuum, there are four processes by which to regulate human behaviour through extrinsic motivation. These processes vary in their level of autonomy, from least autonomous to most autonomous. They are external regulation, introjected regulation, identified regulation, and integrated regulation.

The most autonomous, integrated regulation is believed to develop after ‘identified regulations are fully assimilated to the self, which means they have been evaluated and brought into congruence with one’s other values and needs’ (Ryan and Deci 2000, 73). The authors note that this process is not linear but takes time to come into effect as ‘the range of behaviours that can be assimilated to the self increase over time with increased cognitive capacities and ego development’ (Ryan and Deci 2000, 73). Greater autonomous external motivation is associated with more engagement, better performance, higher quality of learning, retention of participants, and higher scores from observers. These claims were made from investigations with children in the field of education and it was noted that similar findings were identified in other areas such as theology, physical exercise, politics, and environmentalism.

Internalization and integration (perception and assimilation) are nurtured in social contexts that provide relatedness, offers a sense of belonging, facilitates connection with others and competency enhancement and autonomy. To simulate or model an expected behaviour modification, humans must first:

> *Grasp its meaning and synthesise that meaning with respect to their other goals and values – such deep, holistic processing is facilitated by a sense of choice, volition, and freedom from excessive external pressure toward behaving or thinking a certain way* (Ryan and Deci 2000, 74).

Other literature on the ecology of human development suggests that development should be understood as the outcome of both individual and group behaviour. The ecology perspective argues that communities and the individual interact and influence the existence and changes that occur in each other. This is because relationship with others is generally accepted as one of the fundamental characteristics of being human. Kloos et al. (2012, 7) therefore state that 'there are no truly individual problems or interventions. Everything that humans do takes place in social contexts: in a culture, a locality, a setting, and in a set of personal relationships'.

The unique, valuable and shared realities of individuals are central to the community psychology approach to human development. These experiences take place in several contexts like friendship networks, neighbourhood, religious or community groups, cultural heritage and practices, gender roles, as well as within social and economic structures. Improvement in quality of life is dependent on changes occurring not only at the individual level but also at various contextual levels. Central to community psychology are seven core values – individual and family wellness, sense of community, respect for human diversity, social justice, empowerment and citizen participation, collaboration and community strengths, and empirical grounding (Kloos et al. 2012). These values are interrelated and should be examined within a web of relationships to avoid distortion of the realities of individuals and communities.

Operationalising the community psychology approach to human development has three key stages. It starts with an understanding of the relationship between the ecological contexts and existence of individuals. Ecological contexts consist of individuals, microsystems (e.g. families, friends), organisations (e.g. community groups, religious congregations), localities (e.g. rural areas, towns), and macro-systems (e.g. cultures, governments) (Kloos et al. 2012). Answers to some salient questions could help to illuminate the relationship between and development of individuals and ecological contexts.

Kloos and co-authors (2012, 171) suggests that strategies can be developed 'to create or alter contexts to enhance individuals' quality of life'. These strategies propose changes through prevention and promotion based on four principles – interdependence, cycling of tangible and intangible resources, adaptation and

succession. Prevention of disorder and ineffective use of individual and community resources along with advancement of well-being are the underlying goals of community psychology. Development of individual and community can be further enhanced through analyses of risk, protection and resilience.

Citizen participation, empowerment and control embody the third stage of the ecology system approach. It is believed that these processes reinforce and strengthen each other and help to create an enabling and sustainable environment for individual and community development. Creation of this enabling environment occurs over time and requires collective cooperation among all ecological contexts. This dynamic system, if it functions well, can contribute to community and social changes. Progress towards these changes can be monitored through interactive and responsive evaluation.

Kloos and co-authors (2012) point out some of the non-monetary rewards that citizens may derive from participation. They explain that participation in community activities can result in having a sense of pride in one's accomplishment, becoming aware of personal contribution to the development of others, having beneficial affiliations, actively address shared concerns and celebrate achievements with and of others, enhancing practical knowledge, recognising the value of community social and economic facilities and resources. The authors also note lack of time autonomy, lack of child care support, feeling of isolation and non-beneficial gatherings as barriers to a rewarding participation.

Yet White (1996) argues that those barriers and rewards of participation are not neutral. She argues that participation is highly political which exaggerates diversity among participating groups and individuals and even though community members often get involved in activities, their involvement doesn't always translate into effective participation. Effective participation, according to White (1996, 7), includes taking part in the 'management and decision-making' aspects of the community life. Arnstein (1969, 217) posits similar argument when she describes the highest order of citizen participation as citizen control, a state in which the 'have-not citizens obtain the majority of decision-making seats, or full managerial power.' Citizen control is one of eight rungs on Arnstein's (1969) ladder of citizen participation. The other seven are, beginning with the lowest level, manipulation, therapy, informing, consultation,

placation, partnership and delegated power. The author suggests that participation can generally be described as one or a combination of these levels.

It can therefore be construed that through participation women can acquire or enhance the capability relevant to create and re-create new selves. Such an argument challenges the stereotypical permanent structure of gender identity along with the superior influence of the visible social over the invisible psychological reality. In the discourse of human development this challenge could be reflected in that:

> *Standards of narrative coherence must be radically revised and that narrative strategies for locating and articulating gender identity ought to admit to a greater complexity or it may be that performance may preempt narrative as the scene of gender production* (Butler 1990, 339).

3.6 Summary

It is undeniable, that development economics has made a significant contribution to human progress and current evidence indicates that it will continue to do so. What is also undeniable is the evidence that shows how a narrow view of development economics has contributed to ill-being and unintended social and economic deprivation for individuals and societies.

The aim of enlarging people's choice is a broader concept of well-being than that of economic growth. The contribution of the UNDP as a global advocate and its work in the distribution of the HDI and other various measures of human development has provided countries with a general yardstick to assess their own progress. However, empirical evidence from the literature review reveals that the HDI is not an effective tool for evaluating well-being at the national and local levels. The predecessors to the HDI have similar limitations.

Yet these theoretical contributions to human development reveal some enduring lessons about human behaviour and progress that are common across most theories in this review. First, human beings are diverse and their diversity should be accounted for in measures to advance their well-being. Second, development is a process of transformation, which includes giving up some habits as new behaviours are adopted. In this process, transformation of the mind-set of individuals and groups may be a

precondition for other aspects of growth for some individuals and groups. Along this line of argument, the achievement of freedoms should be used as tools to advance other freedoms and not as a means of escapism. Third, development includes the accumulation of valuable resources, including psychological capabilities. Fourth, mechanisms such as agricultural innovation, technology, access to financial services, educational institutions, and healthcare services have been cited as valuable means to human development.

It is the first lesson mentioned, regarding human heterogeneity, that most feminists are discontented with because women are still being treated as a homogenous group. Women are often viewed as having the same goals and desires and treated as victims. There are others however who treat women as people with valuable potentials and functionings. Long before WID, WAD and GAD, the contributions of women to development have been of great interest to economists. Not in seeing them as factors of production but as human beings with valuable capabilities that can transform their disadvantaged conditions, utilise opportunities outside the sphere of their caregiving functionings and thereby expand their life choices. Feminism continues to promote the creation of new knowledge about women by women as a strategy to enhance their development and raise consciousness about the disadvantaged conditions in which women and their families live.

The capability approach has served as a vehicle for the promotion of the development that women desire. That development is well situated within the capability paradigm because the capability approach values human diversity and sees women as they are – people who share the same sex but have different personalities, values, and goals and different strategies to achieve those goals. The capability approach promotes public deliberation which is similar to advocacy within feminism. The perennial challenge within feminism is to ensure that women of all classes, races and locations are heard. One way of addressing this need to practically embrace human heterogeneity could be to include an evaluation of real opportunities and processes that affect the lives of women, as proposed by the capability approach. The personal and social environments were noted as good starting points within which to evaluate real freedoms. The literature review indicates that assessment of the personal and social environments

which takes into account psychological aspects and levels of participation can advance knowledge about human development.

In the next chapter, the capability approach will be used to evaluate the opportunities and processes that have enabled and constrained the development of rural women in Jamaica. This evaluation will be carried out over two distinct periods, that of the slave plantation society and post-independent Jamaica. Special attention will be given to making visible the values, capabilities and functionings of women, as well as the role of agency in their development.

Chapter 4. Valuable freedoms of rural women: A Historical Overview

4.1 Caribbean feminism and the development of women

Caribbean feminists have been at the forefront of charting the development pathways for women of the region. Narratives of Caribbean women are based on diverse realities and appear to be complex. Barriteau (2003) suggests that knowledge of their diversity has not been effectively applied to development practices. To address this implementation gap, St. Hill (2003) in her work on theorising gender and development in the Caribbean, proposes a 'strategic universalist feminism' in which the development of women is based on general human needs, while being cognizant of differences and cultural influences. She argues that this approach of balancing both the normative and cultural aspects of their development is an imperative because:

> [When] *faced with real desires and imposing obstacles, women will often adapt their preferences to conform more closely to what is possible. Situations that develop out of social learning must always be evaluated according to informed preferences rather than just the given preferences* (St. Hill 2003, 66-67).

Based on Caribbean examples, St. Hill (2003) cautioned the wholesale acceptance of the range of choices made by women in the region. She maintains that sometimes their agency roles conflict, to a large extent, with their well-being. She emphasises that it is therefore an imperative of feminist theory and practice in general, and specifically in the Caribbean, to practically include and detect 'how the experience of subordination warps people's preferences and thus their choices and ranking of these preferences' (St. Hill 2003, 70). In other words, St. Hill (2003) warns that what appears to be the free choices of Caribbean women might be strongly influenced by downward adaptation.

Downward adaptation is viewed as a normal human response to changes in one's environment, which can be non-beneficial to well-being either in the short or long term (Schermer 2013). It is mainly this negative effect of downward adaptation on human development that merits its inclusion in discussions on Caribbean development in general, and specifically the advancement of women. Historical factors, such as slavery and colonialism, are believed to have significantly transformed the Caribbean region (Beckford 1972, Mathurin Mair 2006, Burnard 2004). Persistent poverty and

underdevelopment are aspects of the Caribbean environment which contextualise the perceived downward adaptation that might impinge on the development of Caribbean women (Beckford 1972; World Bank 2015).

The current state of literature by feminist theorists in the Caribbean indicates that there is no consensus on a framework of development for women. Authors such as St. Hill (2003) and Mohammed (2000) put forward cases and concepts as necessary guides for framing the development agenda. In projecting the future of feminism in the Caribbean, Mohammed (2003, 117) was aware of the difficulties in unifying differences but was optimistic that:

> *There are alternative and more fruitful ways of organising the sexual division of labour, of managing households and families, of ruling societies and shaping welfare policies, and of structuring the global political economy such that the arguments between ethnic or racialised groups, different classes and the sexes are not resolved through violence and warfare.*

Barriteau (2000) argues that current ideas and approaches should be further scrutinised. Although Barriteau (2003) announces the importance of the knowledge created about Caribbean women by Caribbean scholars, she questioned those efforts with a series of challenges, which although relevant, represent incomplete pathways to enhance the development agenda of women in the region. One of the challenges highlighted by Barriteau (2003, 38) that is salient to this study, is the challenge to 'rethink the processes we can develop and use to ensure that democratic practices define how we create knowledge …' Barriteau (2003) inadvertently provided the answer to this challenge. By emphasising challenges and outlining strategies of confrontation and resistance Barriteau (2003) and scholars with similar approaches, have become distracted from the promotion of effective application of the knowledge that they have already created. A change in the strategy of exclusive confrontation, and one combined with productive implementation of past and current knowledge could be a meaningful starting point to 'alternative and more fruitful ways' (Mohammed 2003, 117) of addressing the challenges and utilising the progress made towards the development of Caribbean women, especially poor rural women.

Nevertheless, Wynter and McKittrick (2015) framed their critique of the advancement of the people of the region with similar arguments of confrontation as Barriteau (2000, 2003) and propose that being human should be reconceptualised. However, these

authors provided no clear proxy that could be applied at the practical level. Walcott (2015) contests issues of sovereignty, nation and citizenship, in a similar vein as Winter and Mckittrick (2015) who continue problematising Caribbean culture and development within a historical context but with no clear pathway to operationalise a solution. On the other hand, Boyce Davies (2015, 219) examines features of Caribbean culture, such as dances, masquerade traditions and Jonkonnu as 'social and cultural materials and knowledges' which were useful tools for Caribbean people of 'different kinship systems' to invent themselves as a people.'

Bean (2016) indicates that alongside the strategy of confrontation, Caribbean feminists and gender scholars remain committed to the creation of knowledge that is relevant to their diverse realities. These creations are situated in the Institute of Gender and Development Studies (IGDS), which is a product of the work of previous Caribbean scholars and activists. These scholarships continue to interrogate stereotypical dominant ideologies about Caribbean women and men while providing tools for the creation of more meaningful conceptualisations of valuable development issues as they 'reimagine the loci of feminist theorizing and gender activism in the region'(Bean 2016, 9).

This overview of feminist debate on the development of women in the Caribbean indicates that Caribbean authors have not yet arrived at a consensus of what women's development in the region should encompass or be presented as a practical alternative to that which was formulated almost two decades ago (Mohammed 2000; Innerarity 2000). At that time material, physical and social dimensions of the lives of Caribbean women dominated development discourse (Denis 2003; Leo-Rhynie 2003), with intersperses of psychological issues. The lack of consensus however does not suggest disagreement but rather an ongoing deliberation of diverse valuable issues. However, the overview uncovered structural discourse, oral history, historiography, policy analysis, re-envisioning, activism, and other fruitful tools across countries, classes, ethnicity and gender that continue to create new and relevant knowledge for the peoples of the Caribbean (Bean 2016). This chapter employs historiography and re-envisioning in examining the lives of black women in rural Jamaica.

This chapter provides an important historical background to the lives of the rural women that are the focus of this study. It recounts women's experiences and adaptations under slavery, and then culminates with a brief overview of the participation of both rural and urban women in the profession of higglering. Both slavery and higglering are very relevant to this study in terms of providing the historical context to the current status of rural women and their personal characteristics, social arrangements and economic opportunities. These features of Jamaican society are viewed as appropriate contexts from which to begin the evaluation of the freedoms, functionings and capabilities of rural women. Some authors suggest that the legacy of slavery and the plantation society continue to influence the quality of human development for Jamaica women (Kerr 1995; Satchell 1995; Wilmot 1995; Innerarity 2000; Vassell 2000; Wright 2004; Zips 2011; Stewart 2014; Altink 2007; Mathurin Mair 2006).

Furthermore, the Rural Economic Development Initiative (REDI) project was promoted as a strategy for economic growth through small-scale farming and tourism enterprises via the same internal marketing system as higglering. The main aims of providing this historical background are to indicate what some of the valuable freedoms of rural women might be in post-independent Jamaica, possible reasons why they might be valuable, and reveal the nature of higglering as an outcome of the internal marketing system. The nature of higglering will serve as important contextual background to the potentials of REDI.

Slavery and higglering, as features influencing the development of rural women, were viewed through the lens of the capability approach, as a contribution to the ongoing deliberation on development perspectives of Caribbean women. First of all, the capability approach demystifies heterogeneity, by 'making room for a variety of human acts and states as important in themselves' (Sen 1993, 33). Second, the capability approach adds value to various freedoms that allow people to live the life they value and have reason to value (Sen 1993, 1999). This means that the obsession within feminism with the productive and reproductive roles of women as ends can be challenged or revalued. Adding Rose's (1999) conceptualisation of freedom helps to further illustrate Sen's (1999) arguments about freedoms and valuing the acts and states of the individual. Rose (1999, 62) views freedom as 'the act of liberation from

bondage and slavery'; he also discusses freedom as a tool that the individual chooses to use or not. That choice therefore makes the person a free agent who is equipped with choices in all circumstances. For example, given the historical context of the slave society in Jamaica, the enslaved woman is also a free agent who uses her choice of freedom (as a means) to act or not to act to achieve the life she values, be it freedom (as an end) or something else. To arrive at this perception, Rose (1999, 95) suggests that one must 'deprive oneself of the opportunity to use the value of freedom as the basis for critical judgement.'

This review uses the arguments above as put forward by Sen (1999) and Rose (1999) regarding freedom to interpret the enslaved woman also as a free agent. The aims of this broader reconstruction of the slave woman is to first of all identify the ways in which she practiced freedom and questioned her enslavement, the processes that allowed her freedom of actions and decisions, the real opportunities she had, given her personal and social experience of slavery, as well as the impact of her actions and decisions on the ends of her valuable life goals. It is expected that this understanding of female life conditions, actions and choices will reveal some continuity and changes in the current development trends of women in Jamaica. Special focus will be on the policies of the Jamaican government and their influence on the freedom of the free agent during and after slavery. In an attempt to have a more holistic understanding of the life conditions of these agents, this review adds the psychological to the material, physical and social dimensions of development. The review examines those contributions over the early period of the slave plantation society. Changes and continuity in the development of these agents were assessed using functionings, opportunities, and processes.

The review aims to identify valuable functionings, opportunity and processes of women in the Jamaican slave society and suggests why they were valuable. First, the review begins with a definition of slavery and then moves on to an overview of women as property as the initial state of their well-being. Functionings, opportunities and processes that facilitated the enslaved woman to express her humanity are discussed. The overview ends with a summary of the profession of higglering as one such functioning, process and opportunity in which rural and urban women still participate.

4.2 Slavery

Indigenous Jamaicans and Africans who were kidnapped as slaves underwent a multiplicity of oppression during the over 450 year plantation system in Jamaica spanning from 1494 to 1961 (Jamaica Information Service 2014). The termination of the slave trade in 1807 and the declaration in 1834 of the intention to eradicate slavery did not culminate in the end to the plantation system (Williams 1944; David et al. 1976; Edwards 1980). The colonial plantation system, along with features similar to the quality of life of slaves, continued to operate in Jamaica until 1962, when Jamaica became an independent country from Britain (Beckford 1972b). Hence, legally, the plantation system ended in 1962 but according to some scholars (Beckford 1972a; Gray 2004; Zips 2011) the residual effects – political, social, material, psychological and physical – of the plantation system remain critical features of human development in Jamaica in the post-independent era.

Slavery, as a human component of the plantation society, is referred to as 'a civil relationship whereby one person has absolute power over another and controls his life, liberty, and fortune' (HarperCollins 2014). This definition implies deprivation of some fundamental human freedoms and yet it is deceptively simple because it fails to capture the treatment and response behaviour of the slave, which are defining features of slavery (Zips 2011; Burnard 2004b; Mathurin Mair 2006). In another definition, Smith (1954, 243) states that 'slavery is a social institution in which one category of persons, the slaves and their descendants, is placed under the control of another, the masters and their heirs'. Here this author echoes control as the central feature of slavery and notes its intergenerational features, wherein the control of power was passed down to generations and likewise the deprivation of freedoms was acknowledged by the enslaved generations.

Although Smith's definition also provides no explicit information on the responses of the slaves, he notes that slavery was far beyond a simple relationship. He identifies it as an institution of control, an ordering of a society, which moves the concept from the level of the individual to the macro level of the society. In Jamaica, slavery was a community experience and never an individual practice. This was partly because the community level was more effective in reinforcing its psycho-social features, such as fear and control, which sustained its long existence (Burnard 2004). This institutional

arrangement permeates the lives of all peoples on the plantation – meaning the enslaved, freed and the master – and was manifested in all facets, such as the economic, social, physical and psychological domains.

The United Nations (2007) declared slavery and the slave trade as one of the worst violations of human rights in the history of humanity. Harding (1983, 52) argues that slavery's most inhumane treatment was the 'deprivation of the right of personal self-determination.' Deprivation in this form, argues Harding (1983, 53):

> *Creates a condition of dependence such as is more usually associated with non-adult and mentally enfeebled personality, and also that it prevents or destroys a sense of personal self-esteem which is important for any human endeavor or achievement. Put shortly, it tends to deprive the subject of some of his or her distinctly human characteristics.*

Essentially, Harding (1983) suggests that under the institution of slavery people lost aspects of their humanness and they were deprived of self-esteem and self-determination, which are two important factors for human development (Bernstein et al. 2012). In general, slaves owned nothing and were totally dependent on the plantation owner to provide everything for them – food, clothes, shelter, health care, and all necessities to keep the slaves working (Harding 1983). The literature search conducted for this thesis reveals no definition of slavery was found that includes the response of the slaves. They all suggest that slavery was a state of total domination by the owner of the slave who became devoid of vital human qualities. Such perception of total domination is inconsistent with the view that 'there are no relations of power without resistances' (Edkins, Pin-Fat and Shapiro 2004, 2). Edkins and Pin-Fat (2004) put forward this argument in their examination of power or 'relations of power' at the level of global politics but it has relevance at the individual level too. They posit that power 'would not count as relations of power were resistance not present' (Edkins and Pin-Fat 2004, 5). In social arrangements, the presence of life, and the fact that a life is lived or being lived indicates both control and compliance (Edkins and Pin-Fat 2004). A more in-depth understanding of domination can therefore be uncovered by examining both the control and resistance aspects of power. This broader knowledge may reveal how power and domination are sustained and manifested as well as the quality of life which they produce.

4.3 Women as properties

The following excerpt is from the film – *12 Years a Slave* – a historical drama adapted from the personal journal of a slave:

> Solomon Northup: [Epps has just whipped Patsey – a female slave and his concubine – within an inch of her life] *Thou devil! Sooner or later, somewhere in the course of eternal justice thou shalt answer for this sin!*
> Edwin Epps: [Speaking breathlessly] *No sin! There is no sin! A man does how he pleases with his property* (McQueen 2013).

Epps was right, as the legal owner of Patsey – his property – he has the power to do anything he wants to do with her, and he is not obligated to submit to moral or religious authorities. In fact, the term property is not in direct reference to Patsey, the thing, rather 'it is a description of a legal relationship *with* (emphasis added) a thing. It refers to a degree of power that is recognised in law as power permissibly exercised *over* (emphasis added) the thing' (Ridgway 1828, Australian Law Reform Commission 2017, 1). The slave laws conferred on Epps, the property owner, 'the right to use or enjoy the property, the right to exclude others, and the right to sell or give away' (Australian Law Reform Commission 2017, 1-2) with any degree of power he so desires. Therefore the legal aspect of slavery permits the use of power, which the literature generally describes as control. Emergent from the literature on enslavement in Jamaica, control over the slaves by the slave owners and planters was displayed in several forms. The authors described legislative, psychological, social, physical, material, and emotional among other forms of control (Kopytoff 1978; Beckles 2003; Burnard 2004b; Mathurin Mair 2006; Zips 2011). Throughout the literature these forms of control were generally described as interrelated and referred mainly to legislative, psychological, social, physical and material control.

Historians such as Higman (1976), Burnard (2004) and Mathurin Mair (2006) reveal the relationships between these multiple forms of control as exhibited by slave-masters towards slaves during the plantation slave system in Jamaica. Burnard (2004, 210) evaluates the treatment of slaves in Jamaica and believes they were mentally, socially and physically debilitated by the system of slavery. He based his judgement on the details in the 37 volume personal diaries of Thomas Thistlewood, who was a plantation manager and stockyard owner for almost 40 years (1750-1786) in Jamaica. Burnard (2004, 210) declared:

> *All of Thistlewood's slaves were, to some extent, psychologically damaged by their experiences as slaves… Thistlewood's slaves were trapped in a dehumanising life of exhausting labour, debilitating disease, and demeaning social relationships; they were constantly tired, frequently frightened, and subject to continual flux in their living and working arrangements… His carefully controlled but deliberate savagery toward his slaves destabilised slave communities and allowed him to act as a vengeful facilitator who intervened powerfully, violently, and usually successfully in slaves' domestic and personal lives, bolstering his authority in a world where custom was attenuated, the law was of no avail, and a master's power was close to absolute.*

Burnard (2004) acknowledges that female slaves generally experienced multiple challenges simultaneously, including psychological trauma during and after pregnancy due to a combination of doing strenuous work, being flogged and responding to the sexual desires of their owners. The author further elaborates on the inhumane practices of control and notes that they left indelible scars on the slaves, especially female slaves:

> *… [They] exacerbated the psychological trauma inherent in slavery. Some women slaves… became so traumatised and demoralised by the manifold injuries they suffered under slavery that they essentially gave up or refused to continue surviving* (Burnard 2004, 217).

Female slaves especially, lived with the reality of double subjugation which encompassed harsh forced labour in the field coupled with the incessant threat of rape and sexual exploitation(Beckles 2003).

Authors who explored the personal diaries of Thomas Thistlewood helped in revealing the depth of depravity, corruption and poverty that can be practiced in the presence of human freedom (Hall 1989; Burnard 2004; (Robertson 2006). Freedom as a means of power has the potential to be limiting. Both Burnard (2004) and Robertson (2006) refer to Thistlewood as a rapist; and they recounted his sexual and physical brutality towards slaves as extreme depravation. Paton (2005, 254) notes that the brutality and 'day-to-day cruelty' of Thistlewood included 'invention of bizarre and degrading punishments for the enslaved people he managed and owned, and his casual and repeated rape of enslaved women.' Paton (2005) and Robertson (2006) argue that the behaviour of this planter and owner was not unusual. From Paton's (2005, 254) assessment she states, 'there is little to suggest that his behaviour was an aberration in the context of eighteenth-century Jamaica. There is no record of his receiving any censure from other

whites for his conduct.' The power of Thistlewood appears unyielding, as (Burnard and Follett 2012, 432) reveal that:

> *Between 1751 and 1764, he [Thistlewood] recorded in his diaries that he had intercourse 1,774 times with 109 black women and two white women, seventy-one of whom he had sex with only once. Thistlewood's predations were designed to convert the institutional dominance of slavery into personal dominance. By targeting slave women for sex, Thistlewood stamped his authority over enslaved families. He belittled enslaved men and women, and converted the bondswoman's body into an object of sexual gratification.*

Yet the expressions of freedom displayed by Thistlewood were limited not by the law but by his own actions. The free reign he had over enslaved women and their families was reined in by venereal diseases and Phibbah his lover. Burnard and Follett (2012, 429) reported how Thistlewood 'suffered repeated bouts of gonorrhoea for most of his adult life, which began even before he departed for Jamaica.' Regarding the role of Phibbah in positively changing the behaviour of Thistlewood, Burnard (2004) agrees with Hall (1989) and reiterates:

> *Thistlewood's open and affectionate association with Phibbah and her family encouraged him to temper his behaviour toward his slaves and provided him with a greater appreciation of their world. In this respect, creolisation was a two-way process: [Phibbah] "Africanised" Thistlewood as he and other whites "Europeanised" her.*

It is undeniable that slavery dehumanises people, and as for the African woman, Mathurin Mair (2006, 53) traces how slavery in Jamaica 'transformed her into mere cargo, her identity expressed through the transfer of an entry from a bill of lading to an estate inventory.' As an item on the inventory list, Mathurin Mair (2006) notes that the slave owners sought to maximise the utility of his property by extracting productive, reproductive and sexual returns at the desired degree of control. Furthermore, female slaves were viewed by slave owners as depreciating property unless they were 'breeding additional work units in adequate numbers to compensate for [their] absence from the field gang [during pregnancy]' (Mathurin Mair 2006, 209). In an earlier work by Higman (1976) on the organisation of slave labour in Jamaica, he puts forward similar arguments as Mathurin Mair (2006) regarding the pursuit of the slave owner to maximise profit from one's property. However, Higman (1976) elaborates on this economic perspective of the plantation system and argues that slave owners were able to control their property in a profitable manner. Along with varied

kinds of physical coercion and rewards, slave owners were able to utilise their entire labour force through skilful organisation of tasks and time management, which ensured continuous production throughout the year on the plantation. He states that this division of labour was based on the 'sex, age, colour, birthplace and state of health' of the slaves, and represented a central management principle on plantations in the Caribbean. Yet even with this elaborate standard of control, Higman (1976) states that several aspects of the property were outside the control of the slave master. Specifically, the author reveals that most of the power exercised by slave masters came through their ability to influence the slave population by selective purchase of slaves. However, after the legal abolition of the slave trade, owners were left with a partially fixed labour force that they were relatively 'powerless to control' (Higman 1976, 187). The author explains that their power over their property was further diminished by:

> *The immutable characteristics of sex and colour, and by the inexorable life cycle of the slave… He also saw the slaves' health and disposition as important in the allocation of occupations but, although he did have a degree of control over these factors, he generally claimed or felt a powerlessness to affect them* (Higman 1976, 201).

The same practice of legislation that gave the slave master the power over his property, later reduced that control. This outcome within the system of slavery suggests that the power of the master over the slave is not absolute as was indicated in the above definitions of slavery. The reality of legally sanctioned reduction of power on the part of the slave owner was unimaginable during pre-abolition slavery. One of the conversations between a slave owner (Edwin Epps) and an abolitionist (Bass) in the film, *12 Years a Slave*, illustrates the contestation of the law to always protect the power of the slave owner:

> Edwin Epps: *I bought 'em. I paid for 'em.*
> Bass: *Well, of course you did, and the law says you have the right to hold a nigger. But begging the law's pardon, it lies. Suppose they pass a law taking away your liberty, making you a slave. Suppose.*
> Edwin Epps: *That ain't a supposable case.*
> Bass: *Laws change, Epps. Universal truths are constant. It is a fact, a plain and simple fact, that what is true and right is true and right for all. White and black alike* (McQueen 2013).

A great deal of the historiography is focused on legislative control and its influence in the treatment of the slaves. Although Burnard's (2004) account of slavery, taken from

the life of Thomas Thistlewood, might portray it as a state of lawlessness, other historians provide the legal contour of the plantation system of slavery. Objectively, previous studies have established that the plantation system of slavery in Jamaica was an efficient structure with layers of hierarchy of management, which was sustained by a plethora of legislations (Williams 1944; Higman 1976; Mathurin Mair 2006). According to this body of literature, the policy framework for the slave plantation consisted mainly of legislations on production, wealth and material accumulation, reproduction and social order, as shown in Table 4.1 Policy and legislative framework enforced in the slave plantation society in Jamaica. Some of the legislations are specific to certain areas of the society, while others, such as the Emancipation Act of 1834 impacted the overall society.

The following section of the review provides information on how some of these legislations led to and contributed to the treatment of slaves, especially women as property during the slave plantation society. Special attention will be given to the period of the 18th century to the mid-19th century. This period is significant because it was the era during which the major policy and legislative framework was developed, which defined slavery and the plantation system in the Caribbean (Mathurin Mair 2006). The depth of the analysis will cover slavery and its impact on higglering and the instrumental roles that women play in family and household survival.

Other themes during the period of the late 19th century and 20th century, such as the possibilities and adjustments for all Jamaican women and the effects of the rigid class system, will be analysed for their pertinence to the valuable freedoms of rural women.

Production legislations. The plantation society was created as an economic system of trade and production, and sustained by a plethora of acts of Parliament, letters of the Colonial Secretary, reports of the House of Assembly and other legal instruments (Ridgway 1828). Mathurin Mair (2006) states that the 1711 and 1713 Discrimination Acts prohibited all other races apart from whites – mulatto (Afro-English), Negroes, Indians and Jews – from public office and managerial positions on the estates. Legislations of 1730 restricted the creative economic activities, such as higglering, of the free and enslaved coloureds. Edwards (1980, 17) defines higglers as a group of ‘itinerant as well as stationary traders who hawk and peddle goods through the streets

or in the market place.' With the decline in slave population and the motivation to protect its labour force, the British Empire was jolted and developed corrective policies, such as the Consolidated Slave Acts of 1792. This piece of legislation enforced tax and bonus incentives to overseers, as well as benefits and work exemptions for 'every female slave with six living children' (Mathurin Mair 2006, 220). After the abolition of the slave trade in 1807, according to Mathurin Mair (2006), other incremental pieces of legislation along with special measures were implemented by overseers to enhance slave population as a strategy to protect both their corporeal and non-corporeal properties.

Table 4.1 Policy and legislative framework enforced in the slave plantation society in Jamaica

Production legislations	- 1711 Discrimination Act - 1713 Discrimination Act - 1730 legislations - Emancipation Act of 1834
Fertility and reproduction legislations	- Consolidated Slave Acts of 1792 - Act of 1733 - Electoral Law of 1733 - 1816 Slave Act - Emancipation Act of 1834
Wealth and material accumulation legislations	- Devises Act of 1761 - Maroon Peace Treaties of 1739 and 1739 - Nanny's Land Law of 1740 - Emancipation Act of 1834
Legislations for social order	- Royal Proclamation of 1661 - Act of 1674 - Act of 1696 - Black Act of 1723 - Act of 1733 - Act of 1748 - 128 Acts of Privilege passed in the 1700s - Slave Act of 1826 - Reform Act of 1826 - Emancipation Act of 1834

Reproductive legislations. The *Law of 1733* promoted the biological engineering of freedom among the black and coloured slaves. Mathurin Mair (2006) states how this piece of legislation established a process of reproduction through which the children of blacks and coloured slaves could secure their freedom. She notes, '"mustifinos" and

lighter-skinned coloureds, namely, those persons above three degrees removed in a lineal descent from a black ancestor, were deemed white and enjoyed the status of English citizenship' (Mathurin Mair 2006, 89-90). The author acknowledges that 'the population had taken seriously legal encouragement to move from one race to another in three generations' (Mathurin Mair 2006, 90) and reveals that 'the genetic process of producing more creole whites worked. The early records deal with the first generation hybrids, that is, mulattoes (in the strict sense, offspring of black and white). By the end of the eighteenth century, [there was] a high incidence of quadroons (that is, offspring of mulatto and white) and of mustees (offspring of quadroon and white).'

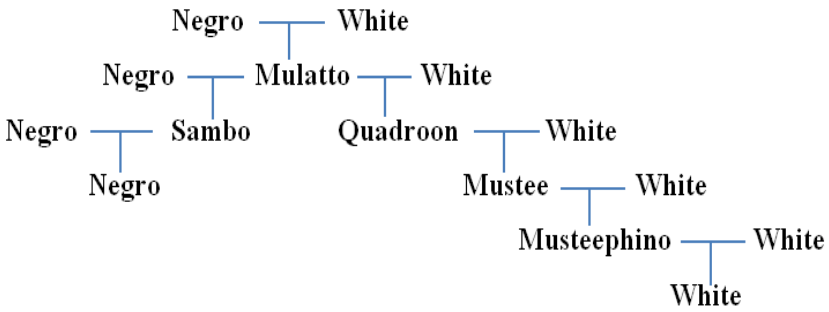


Figure 4.3.1 Genetic engineering of freedom using female fertility during the Jamaican slave plantation society

Source: Figure reproduced from Higman (1976, 139).

This process of genetically engineered freedom, as illustrated in Figure 4.3.1 Genetic engineering of freedom using female fertility during the Jamaican slave plantation society was confirmed by Higman (1976, 176-78) who reveals that slaves who were closer to white had a greater chance of being set free:

> *The percentage of the slaves manumitted[2] who were males increased steadily as they moved from blackness to whiteness. Of the black slaves manumitted from 1829 to 1832 only 38 per cent were males, but 47 per cent of the quadroons were males, and 55 per cent of the mustees. This pattern was related to the fact that the chances of manumission increased as the slaves approached whiteness… In Westmoreland, for example, black male slaves were manumitted at an average age of 42 years and females 36 years, samboes at 32 and 22, mulattoes at 15 and 20, quadroons at 14 and 15, and mustee males at 2 years.*

The *1816 Slave Act* was another law related to the reproductive capability of female slaves. At the policy level it proved incentives and rewards to most people involved in the process of enhancing the birth rate on the plantations, which included not only the

[2] The act or process of being released from slavery; to set free (Oxford University Press 2017).

mother of the live birth, but also the midwives, nurses and slaveholders (Mathurin Mair 2006). Beckles (2003, 154) refers to this program of incentives as the 'woman policy.' However, both Beckles (2003) and Mathurin Mair (2006) state that the main purpose for this legislation was not directed at improving the conditions for female reproduction, but rather to abate the island-wide decline in the slave population which was detrimental to the economic viability of the plantation system. After the passage of the *Emancipation Act of 1834*, Mathurin Mair (2006) observes that the *1816 Slave Act* entitlements for women became areas of contestation which no longer had any legislative support. The author recorded several cases of abuse of pregnant women and punishment of working mothers after Emancipation mainly due to their childcare responsibilities.

Wealth and material accumulation legislations. As noted by Mathurin Mair (2006), the *Devises Act of 1761* restrained the freedom and property acquisition of all blacks and their offspring, including mulattoes, for the purpose to prevent infringement on the status and wealth of the ruling class. In her assessment of the *Devises Act of 1761,* she argues that 'the creole policy of elevating the coloured, within limits, went hand in hand with their policy of downgrading him or her, within limits' (Mathurin Mair 2006, 95). On the contrary, Mathurin Mair (2006) and Zips (2011) acknowledge that the *Maroon Peace Treaties of 1738 and 1739*, along with *The Land Patent* – the right to 500 acres of land allotted to Nanny and her people were far more progressive. This was because the Maroons were free Jamaicans who were never enslaved by the British.

Legislations for social order. The *Acts of 1696* were identified by Smith (1945) as the foundational slave law in Jamaica which dealt with most social issues such as limiting and monitoring the mobility of and group formation of the slaves. He believes fear of retaliation was the main motivation for most of the slave acts. Similarly, Mathurin Mair (2006) holds the view that fear and the desire to control the social relationships of the slaves influenced the *Acts of 1696*. With regards to the *Acts of Privilege,* White fathers were allowed to use it to transfer their properties to their coloured children. Mathurin Mair (2006) summarises the outcomes of those legislations and states that they were exploitative, incremental and provided no real freedom to coloureds. She explains that all of the 128 laws, except four, relating to citizenship rights were incremental in practice and generally did not confer all the

citizenship rights at any given time. This was mainly in the cases for women because the overriding legislation barred women from voting and holding public offices in Jamaica. She states that for women, where their deprivation was not based on their race or colour then they were deprived due to their sex.

Regarding the *Act of 1733*, Mathurin Mair (2006) observed that on one hand it conferred legal citizenship to selected interracial members of the society and on the other hand it denied mulattoes the right to vote. *Act 153 of 1748* conferred for the first time on free blacks, Indians and mulattoes the right to make a court appearance, although it was conditional on one's level of freedom. As properties, slaves generally had to seek permission to marry from their owner, even after the passage of the *Slave Act of 1826* which gave them the right to marry. Mathurin Mair (2006) indicates that the implementation of the *Emancipation Act of 1834* was chaotic and contributed to a lack of trust between ex-owners and ex-slaves.

Given that the general legislative framework was directed at the slave, the masters acted with impunity – punishment was generally harsh and inhumane as owners flogged, maimed and even starved to death their human property. Manumission was at the behest of the master and even with laws and policies in place, the final decision stood with the slave owner. As a property, slaves were denied an education and personal achievements in general. Some authors argue that these deprivations were carefully structured, although not legislated, as part of the control mechanisms of the plantation society. Mathurin Mair (2006) and Burnard (2004a) believe unwritten codes of conduct were directed at creating debilitating psychological responses. According to Smith (1945), group ranking along with special and differential treatments were designed to create internal conflict among different groups of slaves and elevate the white master as the source of their existence upon whom they depend. Smith (1945) further argues about how group punishment was structured to create fear and submission among the entire slave population.

Apart from literature on the policy and legislative structure of control, numerous published studies (Kerr 1995; Wright 2004; Mathurin Mair 2006; Zips 2011; Stewart 2014; HIGMAN 1976; Craton 1987) have described the responses of the slaves to the coercive and inhumane treatment of the plantation system. What we know about the

responses of slaves towards slavery is largely based on investigation of resistance and rebellion (Craton 1987; Mathurin Mair 2006; Zips 2011). Not as much attention has been given to their cooperation, adaptation and accommodation of slavery (Mathurin Mair 2006; Burnard 2004; Higman 1976; Kerr 1995). In an attempt to capture the various responses of the slaves, the next section is focused on female slaves and their reactions, with special attention to their behaviour towards governmental control.

Additionally, this section identifies the functionings, opportunities and processes associated with the reaction of the black and coloured female slaves in Jamaica. This information was gathered from and compared across three distinct periods in the process of human development in Jamaica. The review begins with the period of the slave plantation society. This starting point is not an assumption that the slaves were initially devoid of development, which could not be further from their reality since many Jamaicans today still practice aspects of their African heritage (Wright 2004; Zips 2011; Stewart 2014). The main aim is to situate her past experiences and responses alongside the current ones within a singular context, that of Jamaica. Theoretically, such information provides the 'evaluative space' relevant for the identification of valuable functionings, opportunities and processes (Sen 1993, 32-33). Using data from historiography on slavery in Jamaica, information on what, how and why female slaves reacted to slavery is discussed in the following sections.

4.4 Women being human: The plantation society (1494 – 1833)

Consistencies were identified during a review of the historiographical studies about women in slave plantation society in Jamaica. These studies almost always document some human violation as a prelude to the reaction of the slaves to the system of slavery. Domination over their social rights emerged from the literature as a common cause of strife between slaves and masters on Jamaican plantations. According to Higman (1976), one of the common factors that resulted in slave runaways was separation from their family and friends. Mathurin Mair (2006) reiterates how the black female slave was in a perpetual battle because the plantation society emphasised her productive and reproductive functionings, while it held in contempt her identity, femininity, cultural values and communal commitments. Zips (2011) examines the rebellions of Nanny and the Maroons as an outcome of the encroachment of the British upon the freedom and rights of the Maroon communities. Furthermore, adaptation, accommodation and

resistance by Jamaican slave women, according to Burnard (2004, 210), were direct responses to violation of their functionings as 'workers, mothers, and sex partners.'

Before further examination of these various responses, it is necessary to outline the other ways in which these women expressed their humanity. Several authors acknowledge that the productive, reproductive, sexual functionings of females were valuable to the operation of the plantation system and society. Leisure activities, social relations and psychological skills were also functionings of the female slaves. The works of Higman (1976), Burnard (2004) and Mathurin Mair (2006) were useful in the preparation of the following outlines of these key functionings. The outline begins with the productive activities they did during the plantation society.

Women as producers and entrepreneurs. As a key feature of their productive functionings, female slaves staffed the houses of the planters; they were field labourers alongside the men and also performed other jobs, such as buttery keeper, seamstress, washerwomen, nanny, and cooks, among others. The authors suggest that through these and other roles female slaves contributed to the economic development of the British plantation owners and colonialists (Beckles 2003; Burnard 2004; Mathurin Mair 2006). Beckles (2003) and Burnard (2004) agree that slave women added value to the estate through their roles as producers and reproducers.

Nevertheless, the majority of black women worked as unskilled agriculture workers on sugar plantations and they often outnumbered the men as field workers (Beckles 2003, Mathurin Mair 2006). This sex ratio, according to Mathurin Mair (2006), was the result of an enforced creole labour policy which stipulated that a woman be placed as a field or house worker while the men had a wider range of job options. Other slave women were assigned tasks to take care of other slaves in roles such as nurse, midwife and doctress (Burnard 2004; Mathurin Mair 2006). The creole labour policy was instrumental in restricting the job and skill choices of the enslaved women.

In the markets, female slaves were able to freely utilise their entrepreneurial skills which they brought from Africa. Mathurin Mair (2006) argues that the market, a free enterprise system, became an important space where black female slaves expressed autonomy over the fruits of her labour as well as extracted further benefits from her

food producer and distributor roles. Even though the creole labour policy limited the productive opportunities of the enslaved women while they were on the plantation, it appeared as if they were able to experience some level of autonomy in the market place. Mathurin Mair (2006) reveals that through the market place they were often engaged in domestic food production and marketing, along with the production of mats, straw-hats, wicker chairs and baskets, items of pottery, among other products. The market place provided some levels of freedom to both the enslaved and free women, which they utilised as opportunities to enhance their skills and resources.

Women and their reproductive functionings. Their reproductive functioning ensured the survival of family line and kinship, as argued by Mathurin Mair (2006). Female slaves were caregivers of their own children and those of the plantation owners. In general, family and community goals were important to these women and mothers, some of whom prolonged breastfeeding for multiple reasons. Mathurin Mair (2006) states that for the black woman breastfeeding was valuable for the physical and emotional well-being of the mother and child. It also served as affirmation of her womanhood, a protest weapon and a chosen contraceptive.

Mathurin Mair (2006) argues that the fertility of the slave women was one aspect of their body that was never fully enslaved as they used it to express various life choices, including when to have a child and when to abort, and how long to sabotage the labour needs of the plantation. The author maintains that the bond between mother and child was permanent before, during and after the slave society. Mathurin Mair (2006, 258) states, 'she held on to her young infant as long as the estate would allow her, and longer. She placed herself protectively between her children and the plantation, when it attempted to oppress them. She took her stand against separation from them. She actively, determinedly, promoted their advancement.' It appears that some slave mothers, motivated by the desire to sustain their children, chose to cope with and accommodate the oppression of slavery. Children of enslaved women represented increased assets; hence plantation owners enhanced their economic position in two ways from a female slave, through her productive and reproductive functionings (Burnard 2004; Mathurin Mair 2006).

Female sexual functionings. It appears that female slaves had short and long term consensual intimate relationships with male slaves, planters and slave owners. Rape and sexual exploitation were noted as part of their sexual experiences on the plantation (Higman 1976; Burnard 2004; Mathurin Mair 2006). The sexual experiences of the women often reproduced children, of various skin – black, brown, half-caste and mulatto (Higman 1976; Burnard 2004; Mathurin Mair 2006). The authors note that these shades of skin colour were features of the social and economic hierarchy in the plantation society. From as early as 1675, interracial unions in the forms of marriage, common-law, and liaison between the Africans, Spanish and English were common practices during the plantation society (Burnard 2004; Mathurin Mair 2006). Those interracial unions created the coloured groups, including the common mulatto. This new class of Jamaicans, which resulted from racial liberalism, contributed to blurry citizenship and constitutional rights. For female slaves, their socio-sexual and economic functions overlapped. This was especially the case for coloured women who were preferred as mistresses and prostitutes for the white owners.

Leisure activities of slave women. Female slaves made special efforts to enjoy the allotted leisure time, mainly the Christian festivities of Christmas, Easter and Whitsuntide. Most of the women, in addition to receiving English gifts from their owners, bought special clothes for these celebrations from their personal income (Mathurin Mair 2006).

Women and social relations. It was a constant struggle for the black woman to maintain aspects of her humanity within the slave society. From this perspective Mathurin Mair (2006) states that 'whatever dignity, respect or positive status she salvaged as a bondswoman was derived from elements within the black family and community, which allowed her to perform worthwhile functions as a worthwhile member' (Mathurin Mair 2006, 257). Hence, the black family and community were sites of valuable beings and doings, especially for the enslaved black woman. The spaces of social connection for the black woman 'wove themselves into a network of mutual supportiveness and concern, providing for the woman a broad kinship base to which she gave and from which she derived strength' (Mathurin Mair 2006, 257). The community represented a space of mutual 'obligations of discipline and care' (Mathurin Mair 2006, 257).

Psychological skills of slave women. Free blacks and coloured women displayed strong determination to maintain their African cultural practices, such as women as food producers and their valued role as reproducers of kinship groups. Burnard (2004) and Mathurin Mair (2006) believe enslaved women had the capability to be totally free and that they were motivated by this aspiration for themselves and their children, which was manifested in various ways. According to Mathurin Mair (2006, 264) these women often engaged their cognitive skills, and:

> *…Within their total situation of overwhelming oppressiveness, but also of hopeful possibilities, they showed a constant capacity for assessing the options available to them and for making shrewd choices. They recognised education was a path to advancement; and even though they and their children were excluded from access to education; and in spite of the odds against them, many reached after it, for their children primarily, but also for themselves.*

Mathurin Mair (2006) argues that the resilience, agency and determination of the black woman, although tampered by the system of slavery, survived with the preservation of her African culture, children and community.

4.4.1 Human response to slavery

Discussions that fail to situate the responses of the slaves within at least one aspect of their humanity reduce the value of their responses and make them appear superficial and unpredictable. In general, their resistance, adaptation, accommodation and despair were reactions to some aspect of violation to their humanity. In other words, the violations were stimuli. From a psychological perspective, a stimulus is 'any physical energy [or] any event (either external or internal) which is capable of producing a behavioural event called a response' (Sartain et al. 1973, 480). Therefore, the kidnapping of and arrival of the African woman in Jamaica was the main stimulus to her responses, because she was torn from her people, country and way of life and then thrust into a system of slavery (Mathurin Mair 2006). Upon arrival she began the adaptation process, which is typical of humans (Bernstein et al. 2012).

The adaptation process began with an alarm reaction, which involves behaviour associated with fight or flight. The alarm reaction includes a combination of physiological and psychological responses, 'including rapid breathing, increased

heartbeat, sweating, and shakiness' as the person cognitively processes whether to 'fight' or 'flight' (Bernstein et al. 2012, 528). The pattern of run-away slaves and overt acts of rebellion on and off plantations (Higman 1976; Burnard 2004; Mathurin Mair 2006) were predictable human behaviours and could be viewed as alarm reactions, given the nature of slavery. In the second stage of adaptation she displayed signs of resistance (Bernstein et al. 2012) as the system of slavery progressed. Resistance include 'all struggles that contest a certain form of subjectification' (Edkins and Pin-Fat 2004). Her practices of resistance included overt and covert rebellions, unauthorised withdrawals and strikes from work, pretending to be sick and over-extending periods for breastfeeding (Burnard 2004; Mathurin Mair 2006; Zips 2011).

Persistent stresses accompanied by a long period of resistance may result in exhaustion, but it is also possible for the human to have 'psychological responses to stress [which] can appear as changes in emotions and thoughts (cognitions), along with changes in behaviour' (Bernstein et al. 2012, 530). Some authors refer to these changes as adaptation, accommodation and despair, which for the enslaved female included acceptance of the planter as intimate partner even though he was her abuser, manipulation of privileges; and surrendering oneself to the stressful conditions of slavery (Burnard 2004; Mathurin Mair 2006).

Adaptation or adjustment may be viewed as a process of learning 'through which experience modifies preexisting behaviour and understanding' (Bernstein et al. 2012, 197). Learning refers to a gradual improvement in the mental process of interpreting objects, experiences and emotions in relation to other meanings in the surrounding (Sartain et al. 1973). Learning is one of the central psychological processes and accounts for most human behaviour (Sartain et al. 1973). In addition, how humans perceive, what goals they are motivated to pursue, and what kind of personality they have are greatly influenced by learning (Sartain et al. 1973). Three processes by which learning occurs are classical conditioning, operant conditioning and aversive conditioning (Sartain et al. 1973).

Classical conditioning occurs by way of 'an increase in the strength of a response to a new stimulus by virtue of pairing the new stimulus with an (old) adequate stimulus for the response' (Sartain et al. 1973, 240). Classically conditioned responses cease to

exist when it is no longer elicited by the environment, while in some cases such responses become attached to similar stimuli (Sartain et al. 1973). Operant conditioning, like the classical conditioning, is also a change in the strength of a response, but in this process the change is due to the consequence that comes after, whether positive or negative. Changes in human behaviour are generally the result of operant conditioning through reward and punishment strategies (Sartain et al. 1973). Aversive conditioning includes aspects of classical and operant conditioning in which unpleasant stimuli are used to change or stop behaviour.

Adaptation can also be in the form of coping strategy, which is often not aimed at improving one's condition but rather to survive within an environment (Sartain et al. 1973, Bernstein et al. 2012). Accommodation can be viewed as the process of modifying one's mindset and behaviour, especially when familiar thought patterns fail to be beneficial or to achieve a desired outcome (Bernstein et al. 2012). Adaptation and accommodation are similar because they both require change on the part of the individual, but the former is extrinsically motivated while the latter tends to be intrinsically motivated. From a psychological perspective, despair can include hopelessness, helplessness, demoralisation and distress (Pecchenino 2015).

Understanding what, how and why they responded the way they did may provide more information on the processes and opportunities in which they were engaged.

Practices of resistance. The main forms of resistance displayed by the slaves were fights and rebellions against planters and owners, as well as running away from the plantation. The women generally carried out these practices both individually and also collectively. These activities were generally conducted on the basis of trust among those involved and as direct confrontations or covertly against the legislative framework of slavery.

Kopytoff (1978) notes that opposition to enslavement was expressed through numerous slave rebellions and raids by the Maroons and these rebellions were common occurrences in Jamaica. She states that women contributed greatly to these rebellions, and apart from Nanny other significant female Maroons were Molly and Diana. Mathurin Mair (2006) agrees with Kopytoff (1978) regarding the significance of

Nanny in the practice of resistance and reiterates that Nanny of the Maroons had an active role in the revolutionary fight for independence. She notes that Nanny was the most feared female rebel, warrior and priestess who was never enslaved by Britain. Zips (2011, xix) advances the status of Nanny from rebel and places her in an equivalent African position because of her significant contribution to the pursuit of independence for the Maroons. He refers to her as 'Nanny, founding ancestress of all Maroons – comparable to Queenmothers…credited for her command of military and social groups.' Nanny of the Maroon is currently the only recognised national heroine in Jamaica.

Slave rebellions were common across the Americas and the slaves in Jamaica made their contribution to such disturbances of the British economic system. One of the more significant rebellions was the Christmas Rebellion in Jamaica which lasted from 1831 to 1832, and is believed to have ushered in emancipation (Craton 1987). Craton (1987, 272) describes the Christmas Rebellion in Jamaica as 'the climactic slave revolt' across the West Indian colonies. He notes that it had spread 'over an area of 750 square miles and involved perhaps 60,000 slaves from over 200 estates.' Other notable mass rebellions were the Tacky Rebellion of 1760 and Morant Bay Rebellion of 1865.

In Jamaica, slaves, women and men, became freedom fighters in partnership with Spanish colonists against British colonists. They also formed groups of armed runaways and rebels. Mathurin Mair (2006, 58) notes that 'rebel settlements were the microcosm of free black aspirations' and outnumbered those on the plantations.

The 1738-39 peace treaties, which were the outcomes of the African-Jamaicans (Maroons) who engaged the British in the Maroon wars, were viewed as meaningful outcomes for the Maroon communities in Jamaica (Zips (2011). Zips (2011, xviii) believes the treaties symbolise a 'successful struggle for freedom' and defence of the autonomy and independence of this group of African-Jamaicans who relentlessly fought for a period of 83 years (1655-1738). He asserts that the treaties were the outcomes of resistance and rebellion for the Maroons and part of the process of accommodation by the British colonials. He further stresses that resistance and self-assertiveness were the processes by which Maroons upheld and protected their inalienable freedom.

Most of the large rebellions after 1807 may have influenced or even strengthened the abolitionist movement. While the national and regional rebellions might have contributed to significant changes in the system of slavery, such as its abolition and emancipation, some historians argue that rebellion at the individual level was far less effective. Burnard (2004) believes many slaves employed strategies of subtle opposition and overt rebellion within the system of slavery and although these efforts frustrated the economic and sexual aims of planters, in general, not much was gained at the individual level. He made this assessment with reference to one female slave:

> *Coobah, a rebel who refused to accept the strictures of slavery … she ran away … indulged in … antisocial behavior … stealing food … arguments [and] openly rebellious to Thistlewood, refusing to accept his authority in any matter … she made it impossible for Thistlewood to control her. Nevertheless, her rebellion … operated only within the system of slavery and never really threatened the continuation of the system itself.*

Mathurin Mair (2006) shares the view of Burnard (2004) regarding the limited impact of individual or small group rebellions on the overall system of slavery and notes that such reactions often intensified the punishment. In cases of sexual exploitation, 'slave women who objected to the sexual advances of masters or overseers were subject to victimisation and physical abuse' (Mathurin Mair 2006, 233). Additionally, the legal reprieve for slaves who brought cases before local courts were limited because 'magistrates were members of the white slaveholding class, and slaves could not give evidence in courts of law against whites' (Mathurin Mair 2006, 226).

Another major reaction of the slaves was to run away. This was a common practice on all plantations across the slave colonies. In Jamaica, Higman (1976) records 2,555 runaway slaves in 1818, 2,373 in 1824 and 446 in 1832 and of the number of slaves who ran away in 1832, 34 per cent or 152 were females. He cautions that due to the practice of omitting long-term runaways from the list it is possible that the rate of runaways was generally higher than recorded. Mathurin Mair (2006, 244) states that 'runaways represented those slaves who had the maximum motivation and the maximum number of opportunities for seeking a free life, whether temporarily or permanently'. Female runaways in a bid to make good on their escape employed various tactics and Mathurin Mair (2006) refers to them as being resourceful and artful from forged documents, change of identity, jobbing, as well as being harboured by other slaves along the runaway route, runaway settlements, among others.

Opportunities for freedom were always sought after and seized by women, in spite of the known consequences. Rural female slaves used jobbing as 'an easy step from freelancing to freedom' and many made their way to the cities (Mathurin Mair 2006, 247). Burnard (2004) states that enslaved women with children tended to be least likely to run away.

Mathurin Mair (2006) acknowledges the voice as agency of the black slave women, manifested in her pleas and court cases, her songs of comfort in the fields and her quarrels of discontentment of her place in the slave society. After 1807, groups of slaves who brought cases against overseers and owners symbolised public consensus which could be harnessed for even higher levels of freedom. Female slaves were both leaders and supporters of dissension groups displayed as strikes, rebellions, and other subtle forms of labour withdrawals and plantation sabotage. Some of the covert rebellions in which slaves participated were pretend illness, extended time in the plantation hospital, extended periods of breastfeeding up to three years, which came with allowances of extra food and regular intervals of time off from work, organised subversion, poisoning, self-expressions such as drumming and dancing and runaways (Mathurin Mair 2006). She also notes that small plot farming was both an opportunity to strengthen family units as well as a strategy to resist the plantation program.

Another subtle form of female resistance was identified by Beckles (2003) as a reaction to the 'woman policy', an aspect of the Consolidated Slave Acts of 1792. According to Beckles (2003, 154):

> *Enslaved women had turned their backs against the culture of maternity, and were critical of family development and kinship formation within the hostile environment of slave relations… [They] were practicing gynaecological resistance…*

Adaptation to slavery. Adaptation during the plantation society was in the form of coping strategy but mainly learning through systematic operant conditioning. Jamaica during the slave society is described by historians as an island of contradictions, where slaves were allowed enough 'freedom' to sustain the plantation society and yet it was generally inadequate to earn them meaningful independence (Burnard 2004; Mathurin Mair 2006). Those limited 'freedoms' were forms of economic and social opportunities associated mainly with the 128 Acts of Privilege passed in the 1700s.

Many female slaves and their families were able to benefit from these privileges. However, due to inherent inequalities in those opportunities, most female slaves had to develop various coping strategies to survive their enslaved environment. Some of the coping strategies seem to have facilitated some level of dependence on the plantation system, especially at the level of the family unit.

Family units received an allotment of land for farming and to build a dwelling, but it was usually on or close to the plantation, allowing the owners to have easy access to these families. One opportunity for freedom was the manumission. This was accessed mainly by mulatto children but on account of their planter fathers with limited claim to civil rights. For example, free mulattoes were able to acquire properties. This middle class, the mulattoes or coloured, were not merchants or proprietors but they were above field workers. They were consigned to occupations such as petty local entrepreneurship, artisans, innkeepers, traders, rum distillers, seamstresses, hirers of slaves. Most of these service jobs were not in rural areas so they would in general have to migrate to towns like Port Royal, Kingston, Spanish Town, Montego Bay and Falmouth.

Another opportunity of the slave society was that legally, Christianity was a path to social mobility and at the same time it was legal for women to have extramarital relations with white men as a way of improving the status of themselves and their children. Marriage to white men was an option for free coloured and black women but was viewed as being at the top in the relational hierarchy, hence the majority settled for the lower status of being a concubine. Mulatto women were able to successfully claim child support from their white mating partners in cases of separation. Another opportunity for mulatto women was that within the slave hierarchy they were privileged on the basis of their lighter skin colour, which symbolised a form of upward mobility. Additionally, by law slaves they received a minimum portion of clothing; this allotment was received either as ready-made clothes or the cloth given to them to design their own clothing (Buckridge 2003).

Slaves often exploited some of their benefits and situations. Burnard (2004) states that some female slaves employed strategies of self-preservation by choosing to only have sexual relations with white men. He also notes that prostitution was a common strategy

used by female slaves to win favour from white men. While Mathurin Mair (2006) believes that their diverse mating relationships were coping strategies which contributed to the survival of various unions and kinship lines. Higman (1976, 100) reveals that some young enslaved females practiced abortion ‘in the early stages of pregnancy, from their dread [fear] that child-bearing will interfere with the pursuit of their favourite amusements, and their dislike of the restraint that it necessarily impose on them.’ Burnard (2004) also notes that some enslaved mothers mistreated and neglected their children.

Women being accommodating. Interpretation of the practices of accommodation by the enslaved women indicated what could be viewed as some of the personal goals that motivated them to modify their mindset and behaviour to accommodate the various manifestations of slavery. These women generally accommodated the sexual desires of their male owners and planters; some of them changed their behaviour from resisting to entering into long-term consensual intimate relationships with the male owners and planters; some converted from their African religious practices to Christianity, some took on the European ways of life while others practiced other forms of accommodation. The literature suggests diverse reasons for the accommodating behaviour of slave women, as listed in Figure 4.2 Enslaved woman, personal goals and accommodation Enslaved women made use of their agency as well as legal, social and economic opportunities and processes in their practice of accommodating the structure of slavery.

The Enslaved woman and her personal goals associated with her strategy of accommodation

- Being free
- Having experience of humane treatment
- Being able to own property and possessions
- Being able to invest in the well-being of one's children
- Being able to participate in community and serve in leadership roles
- Having a stable family life
- To achieve spiritual development
- To have a better quality of life
- Being economically independent
- Being able to practice and preserve African culture
- Being a mother
- Being able to productively utilise one's psychological skills

Figure 4.2 Enslaved woman, personal goals and accommodation
Sources: reproduced from Burnard (2004) and Mathurin Mair (2006)

There are some references to the legal opportunities and processes. Mathurin Mair (2006) notes that after 1807, legally, slaves were given rights to apply for redress for maltreatment and other forms of overt abuse. Many groups of slaves, women and men, brought numerous cases against overseers and owners but the overall outcome was 'virtually nothing in terms of legal remedies' (Mathurin Mair 2006, 238). Indeed this author notes the uniqueness of the Jamaican circumstances:

> *… The most interracially permissive area in Anglo-America… with a black preponderance of 90 per cent. Here, no legislation against mixed unions, either marital or extramarital, existed, as on the mainland. In addition to manumission, there were special legislative procedures in Jamaica for elevating the offspring of such unions.'* (Mathurin Mair 2006, 238)

Legally, women had opportunities to pursue their personal goals through their sexual and reproductive capability as well as through the *Act of Privilege*. Some who were mistresses of planters and owners earned their manumission, while others legally acquired possessions, properties and pensions. For example Jennerson, a free black woman, received the following through the will of Samuel Seagrove:

> *His household goods, kitchen furniture, wearing apparel, plate, rings, chaise, and best saddle horse, one hundred pounds, four houses in Kingston, two in Lamb-lane, and*

> *thirteen blacks for life, if she remained single. An annuity of 50 [pounds] and a year's residence in his house in Kingston* (Mathurin Mair 2006, 91).

Mathurin Mair (2006) made note that the children of mixed-race unions were the main beneficiaries of the possessions acquired by the mothers. She gave an example of William Foster, a merchant in Spanish Town who had a child with a Negro slave and at the time of death his possessions valued at over 56,000 pounds which went to his daughter Anna Petronnella. In another case, viewed as common during the slave society, one Stephen Lost, a merchant of St. Catherine took care of his five children after the death of their free mulatto mother and they were baptised and associated with the Church of England. Furthermore, 'he sent three of his children, including his daughter Elizabeth, to England to be educated' (Mathurin Mair 2006, 92).

Mathurin Mair (2006, 92) states, 'the solid base provided by… inheritance became, for individual free mulattoes, their launching pad for an even better life. The peculiarly Jamaican device of a private *Act of Privilege* was the passage to improvement.' Along with bequeathed properties and possessions from their white fathers, coloured children were also eligible for other forms of social mobility, such as Christian education and membership in the Anglican Church. Being a concubine, although low in status, provided real opportunities for coloured and black women as it allowed them legal access to material possessions and a way out of servanthood for them and their children. In the slave society freedom was associated with ownership of 'property, Christianity, education (English style) and a white mate' (Mathurin Mair 2006, 97).

Regarding acquisition of benefits from wills and acts, it was noted that, 'the legislative process was frequently started by the white father, but could be set in motion by the black or mulatto mother or by the coloured offspring themselves' (Mathurin Mair 2006, 92). However, the *Acts of Privilege* was not beneficial to a majority of the mulattoes, as most of them remained relatively deprived.

Some of the social and economic opportunities that facilitated their accommodation were connected to the *Acts of Privilege* as well as their various communities. Reciprocal structures of social and spiritual support were processes used by women to reclaim their humanity in spite of several oppositions and barriers (Mathurin Mair 2006). Marriage, specifically Christian marriage, between slaves came about through

gradual concession from their masters and owners and was a major contributor to the formation of domestic life. While some women and their families lived in inadequate conditions, other slaves combined their cognitive and technical skills along with social capital and addressed their housing needs.

Many slaves, adults and children, made use of the educational opportunity provided by the church. This process of education was conducted parallel to knowledge acquisition based on aspects of the African culture, namely, herbal medicine production, birth rituals, display of respect and reverence, magical and religious beliefs and customs like Obeah (Mathurin Mair 2006). Women had a central role in transmitting the African culture to the next generation. 'Motherhood, the fulfilment of female adulthood, above all else gave shape and meaning to the African woman's life cycle' (Mathurin Mair 2006, 48).

Female slaves who had long-term relations with white men gradually transformed, over a few generations, not only the skin-colour of their kinship group to brown but also their taste in mating partners and status from enslaved to free. Furthermore, through the process of socialisation, the practice of having white partners was internalised especially by children of concubines and became a valuable choice (Burnard 2004).

Mathurin Mair (2006) argues that autonomous earnings from marketing and other ways in which enslaved and freed women sold their labour during slavery, provided them with some level of financial independence. Some used that income to improve their housing and living conditions. Economic returns in the form of income and land acquisition were attributed to their hard labour and not welfare support (Mathurin Mair 2006).

The slaves were a large and heterogeneous group in terms of access to economic opportunities. For example, Sunday market-day was reserved for economic trading yet some slaves in St. Thomas spent that time in church; while some in rural communities in Mountain Clarendon had difficulty trading due to lack of economic facilities and remoteness from main markets. Slaves in the parish of Vere had better economic opportunities since 'it was corn-growing country, which made poultry rearing easy and

profitable. Both land and sea transport, and marketing outlets, were within easy reach' (Mathurin Mair 2006, 263). It is believed that slave women, through their trading, made significant contributions to the economy of the slave society (Burnard 2004; Mathurin Mair 2006).

Some historians refer to the Maroons in Jamaica as the epitome of the power of agency. This group of African-Jamaicans fought and protected their freedom and independence from the British colonialists for approximately 83 years. For almost 400 years they have been able to exist as an independent people even during the British government control (Kopytoff 1978; Zips 2011). Maroons in Jamaica also chose to hold firmly to Ashanti norms and values, which allowed women like Nanny to hold leadership roles (Zips 2011). Maroons were relentless in the pursuit and protection of their freedom. Mathurin Mair (2006, 53) believes that, 'it was the African woman's perception of herself within [her] culture, which accompanied her across the Middle Passage and which helped to preserve her from total defeminisation in the New World.'
Historians made several references to the agency of enslaved women and its role in their practice of accommodation during slavery. Mathurin Mair (2006) argues that the breeding of the mulatto by the black woman was a strategic process of continuing the black kinship. She states that 'the woman could not fail to see that she was the key person in the process of upward mobility' (Mathurin Mair 2006, 97). The mulatto woman in the slave society was considered a 'social and psychological hybrid' (Mathurin Mair 2006, 97), an intercessor for her black slave kinship and a pathway to freedom, albeit incomplete.

Mathurin Mair (2006) argues that the slave women used the process of collective bargaining to request the maintenance of market activities, which she believes was a form of agency within the plantation society.

Burnard (2004) contends that slaves did not surrender all their freedom to the plantation system. Instead, female slaves employed cognitive skills in their roles as mothers and concubines which represented expressions of control and at times usurped power from the plantation owners (Burnard 2004). House slaves developed reciprocal relationship with women of similar status and supported each other emotionally and financially. Burnard (2004, 211) assumes 'a few slave women were able to transcend

the horrors of slavery through their skillful manipulation of privileges gained as a result of close involvement with whites.'

Burnard's (2004) line of argument suggests that accommodation, mainly in the form of having sexual relations with planters and owners might have been a beneficial response of the female slaves, since it provided them with opportunities for upward mobility and freedom. Many earned properties, possessions and manumission by such form of accommodation. This opportunity by accommodation was carefully managed by the mistress of the planter. Burnard (2004, 230) explains how she skillfully balanced the desires of the planter and the demands of the slaves:

> *A mistress gained power through her special access to the master. She fulfilled a vital role within the slave community as an intermediary able to intercede on behalf of slaves. She also provided the slave community with crucial information about the master's thoughts and actions… If the master's mistress abused her privileged status by lording it over other slaves… or if she played favourites or alienated the master by pleading too vigorously on behalf of other slaves, thus usurping the master's power to discipline slaves, she would lose the respect of the master or the slave or possibly both.*

Burnard's (2004) arguments emphasises how the female slave was one of the axis of power which influenced both the progress and decline of the plantation society. His argument is based on the claims that 'they were more closely connected than men to whites. [As well as] the female-centred nature of the slave system, concerned with maternity, fertility, and sexuality' made slave women indispensable to the plantation society (Burnard 2004, 213). Furthermore, female slaves expressed reproductive control through the processes of abortion, infanticide and long periods of breastfeeding.

Within the environment of slavery, some female slaves employed their cognitive skills and created opportunities from their oppression. Bernard (2004, 211) describes how Phibbah, one of Thistlewood's long-term mistresses, used her deprived context to create a semblance of freedom:

> *She not only survived slavery but also transcended it. In part, she did so through associating with Thistlewood – literally by sleeping with the enemy. But she also transcended slavery through her determined efforts to carve out a place for herself and her family that resembled freedom rather than the nominal enslavement that was her formal status.*

Being a house-slave was associated with opportunities for property acquisition and access to freedom for self and or children. Burnard (2004, 214) believes field slaves were 'able to retain more cultural autonomy.' He reveals how some women used their privileged positions, as house slaves and sexual partners, to petition for benefits and freedom for other family members and friends. Their sexual relations with white men within the plantation system were discussed as two way exploitation but Burnard (2004) viewed such response from the perspective of the female slave as a rational choice within a confined environment. Some female slaves pooled their financial resources and used it to buy the freedom of their children.

Zips (2011) argues that the Maroons used cultural assets and collective responses as forms of agency. Maroons represent the victory of organised opposition to slavery. Preservation of their African practice of conferring respect and honour upon Nana (ancestors), as well as communal hierarchy with the chief and *queenmother* as the head was done by members of the Maroon communities. The role of the *queenmother* was epitomised in the life of Nanny of the Maroon who helped to collectively protect their kinship and culture from invasion. Zips (2011) reiterates how collective responses of the Maroons were used as an opportunity to oppose relinquishing their freedom, autonomy and independence to the white colonialist. Retention of their independence provided opportunities to promote their cultural identity. Their opposition and freedom fights won them legal rights to land forever, 500 acres in Moore Town. The peace treaties were tools that enforced the sovereignty of the Maroons on an enslaved colony. Through the resistance and treaties, Maroons in Jamaica, lay claim to 'absolute land rights, jurisdiction power and self-government' (Zips 2011, 210).

Similar to Zips' (2011) argument on strategies used to retain their African culture, Buckridge (2003) describes how women, through ingenuity and resourcefulness, produced clothes that preserved their African culture. Buckridge (2003) acknowledges that they learned about the plants from the indigenous Jamaicans and incorporated that knowledge with their African skills. He describes how the African woman and her descendants in Jamaica enhanced and preserved features of clothing production as was practiced in their region in Africa.

Beckles (2003, 157-8) believes that even within such an inhumane system as slavery, some women were able to achieve aspects of liberation:

> *Through strength of character and strategic vision… Enslaved women swung on the gallows in protection of an inner world that cries freedom; they also slept in the white man's bed in search of love, property and privileges, as well as freedom for themselves and their kith and kin.*

What caused the slave woman to despair? From the literature review, the misery of enslavement and the loss of children were two of the main factors that caused most enslaved women to feel a sense of hopelessness and depression (Burnard 2004). The author reveals that some women were often traumatised by the death of their children.

Table 4.2 Instruments of Freedom during slavery

Instruments of Freedom	Functionings of enslaved women
Social opportunities	- Being part of a community - Public consensus - Mass rebellion - Being dependent - Being able to migrate to urban areas - Being a Christian - Having intimate male partner - Being married - Being brown-skinned - Participate in welfare program - Being a concubine - Being able to practice African religion - Participate in the practice of obeah
Economic facilities	- Being a prostitute - Having ownership of property and possession - Being able to receive pension - Having an inheritance - Having financial independence - Participate in marketing and trading - Farming - Poultry-rearing
Protective security	- Having knowledge of laws and policies - Being able to participate in legal procedures - Being able to benefit from legislative processes - Manumission - Being able to benefit from child support - Securing inheritance for one's children - Genetic modification of skin colour - Special provisions during childrearing

Agency freedom	- Being alive - Being able to resist unwanted control - Having freedom - Being independent of unwanted control - Manipulation of one's environment - Self-assertiveness

In retelling the story of one enslaved woman and the death of her children, as excerpts from the diaries of Thistlewood, he notes:

> *Abba lost four children soon after birth and two sons who were about six years old. When her son Johnnie fainted … and died … Abba was beside herself with grief … almost out of her senses and quite frantic and will hear no reason. Johnnie's death, in particular, affected her deeply. She buried him near her house with singing and dancing, as was the custom in West African funerals, and mourned his loss six months later in a postinterment ceremony … Many negroes [were] there from all over the country* (Burnard 2004, 224).

Historians revealed that female slaves in the plantation society in Jamaica were properties to their masters and owners and were generally in an inhumane state of being (Higman 1976; Burnard 2004; Mathurin Mair 2006). Yet one interpretation of their responses to the system of slavery uncovered various ways in which they were able to express their humanity. Opportunities and processes, some provided by the plantation system and others created by the women and the slave population, made it possible for them to achieve some meaningful goals in their lives and communities. The instruments of freedom from which these women benefitted relate to social opportunities, protective security, economic facilities and agency freedom. Details of these instruments and the functionings achieved by these enslaved women are shown in Table 4.2. Given the nature of the personal and social environment of these women in the plantation society, it appears as if their pursuit of freedom was incremental rather than the outcome of an event or one process.

4.5 Women as human beings: Changes and continuities

The foregoing review discussed the strategies employed by slave and free women during the plantation society in Jamaica from 1494 to approximately 1833. While a lot has changed since 1833, including the legal abolition of slavery in 1834 and Jamaica becoming an independent country from Britain in 1962, women continue to struggle in their pursuit for freedom. The review will now focus on how poor black women continue to struggle for their economic and social freedom in the context of the local

market system and the profession of higglering in Jamaica. Priority is given to these two areas in this research because they are more pertinent to the present case study, the Rural Economic Development Initiative (REDI) project. The REDI project is described in the following chapter.

(Simmonds 1987, 38), in reference to the entrepreneurial activity of higglering, refers to several features which remain the same as in independent Jamaica as they were during slavery:

> *Today's ubiquitous Jamaican urban female marketer can be viewed as part of a continuum from the female-dominated West African marketing system to the internal marketing system of the days of slavery through freedom, to the more recently regularised system of the 'informal commercial importers'.*

Simmonds (1987) and Stewart (2014) reveal similar findings as Edwards (1980) in relation to the prevalence of black women working as higglers. As noted earlier, Edwards (1980, 17) defines higglers as a group of 'itinerant as well as stationary traders who hawk and peddle goods through the streets or in the market place.' Apart from the findings of the high proportion of women in higglering, these authors provide some detailed description of the social and economic life of female higglers in Jamaica.

Socially, according to Edwards (1980) and Simmonds (1987), higglering continues to be populated by females of African descent, 'partly by default of the estate system itself and partly through the independent-minded adventurousness of the slaves and later, ex-slaves in their anxiety to improve their standard of living' (Edwards 1980, 2). He believes higglering was strongly influenced by a number of social factors, such as, the operation of the household, pecuniary status and 'prevailing attitudes to women's work-roles in the society' (Edwards 1980, 2). The author also notes that the sites of higglering became symbolic spaces for the facilitation of solidarity and preservation of meaningful cultural practices. Simmonds (1987), like Mintz (1955), believes the marketing system was a continuation of the African culture for the black female slaves, who had similar functionings in the more developed marketing system in West Africa, such as those of the Yorubaland (Nigeria, Togo and Benin).

Simmonds (1987) adds that by the late 1700s, the internal marketing system was fully established as a prerogative of the slaves and its structure reflected a combined effort, wherein rural producers provided produce from cash-crops and traded them with the urban entrepreneurs, a profession that was occupied mainly by females. Another feature of this marketing system was the presence of street hawkers selling products for their slave masters and mistresses. Simmonds (1987) reveals that higglers were not mere traders within the marketing system, but as traders they were also consumers who helped to bridge the rural-urban socio-economic divide. She points out that:

> *The female slave higglers provided the chief means by which the rural slave population was able to acquire the necessary and desired supplements to the basics provided by their owners, and some urban slaves were able to obtain the entire means for subsistence independent of their owners* (Simmonds 1987, 36).

As a social institution, higglering promoted independent living, mobility and relative freedom in decision-making among the slaves population. In this regard Simmonds (1987, 32-33) claims that:

> *The relative degree of independence enjoyed by male slaves…, who hired out their labour, was perhaps equalled only by those female slaves who participated in the marketing of provisions…and slaves were able to pursue an independent mode of living in the towns.*

Simmonds (1987, 33) quoted Higman (1984, 237) to expound on the level of freedom and autonomy that the slave entrepreneurs had:

> *Wherever they plied their wares and whatever they marketed, the urban slaves generally enjoyed a relatively independent existence and were always responsible for dealing in cash or kind. Some sellers were given a range of goods to sell and were expected to deliver their daily takings to their owners. Others were employed under a system of self-hire and were expected only to make fixed periodic payments to their owners, so that they were responsible for choosing and purchasing the goods they were to sell; and they retailed them by whatever mode they preferred. In either case, the seller was involved in a series of commercial transactions which could not be directly controlled by the owner and which provided experience of a way of life separate from the slave condition.*

The author further reveals that higglering was especially valuable to runaway slaves because it served two important goals – the maintenance of their survival and relative

freedom. However, she highlights that transportation and travel routes were rather precarious for those involved in this profession.

Edwards (1980) states that as an economic opportunity, the occupation of higglering is a continuation of the trading system that originated during slavery. He notes that higglering was viewed as a valuable trading-link between the 'peasant' economy and the 'modern' economy, while meeting the needs of citizens in both rural and urban regions of the country. This further opened economic prospects for the transportation and communication networks. According to Edwards (1980, 2), higglers made a significant contribution to the development of the national economy, 'principally through forms of self-reliance and employment-generation and as a source of cheap food and government revenue.' Simmonds (1987) made similar observation as Edwards (1980) regarding the personal and socio-economic benefits of higglering. She states that economically, the slave entrepreneur was able to earn personal income but was also enhancing the profit of the slave master, hence from the slave masters' perspective, higglering was profitable. According to Simmonds (1987), slave masters promoted higglering because they saw it as a meaningful strategy to maximise the labour of unskilled slaves. Hence everyone was given an 'opportunity' to contribute to the society at large. Female slave higglers were believed to have monopolised the marketing system and functioned as market price regulators, and as Simmonds (1987, 36) notes, 'in their role as 'middlewomen' in the provision trade, slave higglers had the power to regulate the price of 'country provisions.'

The legislative framework, which is another feature of higglering, was described by Edwards (1980) as restrictive in nature and from the beginning it was structured in a negative language of control. He notes that in 1711 the first law was passed, which stated to prohibit higglering of certain goods, except provisions, fruit and other specified articles, or slaves would be whipped as punishment. In 1735 an act was passed to prevent hawking and peddling, and the disposal of illegal goods. Yet still the author notes that the internal marketing system of higglering continued to grow and by 1774 through their trading slave higglers possessed approximately '20 per cent of the 50,000 pounds that was in circulation' on the island (Edwards 1980, 6).

Simmonds (1987) concurs with Edwards (1980) that the local government also had a role in the structure of the internal marketing system and the functions of the higglers. However, she notes that the involvement of the local authorities was both regulatory and expansive in nature. Regulatory mechanisms were in the forms of apprehension, fines, penalties and seizures of higglers and goods, especially illegal goods, from as early as 1802. By representing the regulatory aspect of the marketing system, Simmonds gave examples of actions taken by the local government in the parishes of Kingston and St. Catherine. She notes how the police were ordered by the Kingston Court of Common Council in 1815 to force the higglers off the streets in an effort to stem the burgeoning of this profession and for social order. Acts and legislations were also passed as a means of discouraging the sale of stolen items and provisions by higglers as well as to reduce the trading competition between higglers and other traders. Simmonds (1987, 36) asserts that the higglers became a permanent feature of the local trading franchise. She notes:

> *The higglers had a profound impact on the local economy of the towns. They provided stiff competition for established shopkeepers and other free traders. Laws seeking to regulate 'Negro' trading were undoubtedly aimed in part at stifling this competition.*

Infrastructure development was the main expansion mechanism of the local government in the development of the internal marketing system. Infrastructural expansion of marketing facilities, according to Simmonds (1987), included the construction of new facilities, the establishment of meat markets, and the construction of permanent marketing facilities in Kingston. Additionally, the Negro-Market in Princess Street remained a permanent aspect of the market system along with the facilities at the Parade. The involvement of the local government was partly motivated by the inadequacy of the then marketing system.

Simmonds (1987, 38) concludes that the resilience of the slave higglers led to favourable concessions on the part of the authorities:

> *The response of the white authorities to higglering was a constant spate of regulatory and suppressive measures which were met by the defiance of the higglers. Year after year, new acts and town ordinances had to be formulated to deal with new activities by slave higglers… Instead of continuing to press for the suppression and cessation of higglering by slaves, by the 1820s the authorities had to concede that their activities*

> *represented a deeply embedded social and economic institution and laws became regulatory rather than suppressive.*

Apparently, mere acknowledgement of the value of higglering to poor black women and their families appears to be insufficient to change the legal framework that has held together a system for over 400 years. According to Stewart (2014) the experiences of her research participants in 2014 revealed that not much had changed since the 1800s regarding the legislative aspects of higglering. She reveals, through historiography, that female higglers in general, with specific reference to her research participants, did higglering as a ritual which became a family tradition, an inheritance for their children, a means of income and leisure, and was a significant process in the formation of their identities and social group. Higglering was also a political 'fight'. According to (Stewart 2014, 7), these female entrepreneurs:

> *Fought to be respected and acknowledged in public space and the economy after they stepped out of the factory work … [they had to] fight for the right to work where and how they choose, for recognition as entrepreneurs, valuable to society, and against western patriarchal values and racialised classism … [as] the higgler women and the state fight to define and own Downtown Kingston and considers who in this society has the right to define Downtown Kingston.*

Yet Stewart's (2014) analysis reveals that these battles being fought by the women were not mere contestations for a place but protection of their identity because the 'place' was an integral aspect in the formation of their identity. In essence, they became what they were doing – their doing became their being. Although the author found all these meanings associated with higglering during fieldwork, the research participants stated that they were initially directed to higglering 'as a viable option for their economic needs'. Stewart mentioned that their freedom was in a state of flux partly because of the changing political agenda from 'laissez-faire policies' to 'helping policies' of the 70s and 80s. The participants note that this 'profession' served to meet two of their main aspirations – 'to feed our children and continue…[to survive]' (Stewart 2014, 4).

Blank (2012) highlights the same simplicity in the action and desire of the higglers in her review of Winnifred Brown-Glaude's (2011) book entitled, *Higglers in Kingston: Women's Informal Work in Jamaica*. Blank (2012, 570) reveals that through higglering black female slaves reconstructed their identity from property to agents with dignity

as they ‘support their families through their labour [and aspire for] their children to pursue different, non-stigmatised occupational paths.’ She acknowledges that Brown-Glaude (2011) research participants are aware that the low status accorded to higglering and its ranking as ‘informal’ is not associated mainly with the profession but rather who occupied that profession – former enslaved black female bodies viewed as deviant, vulgar and unfeminine. These poor women have come to realise that the emancipation proclamation did not remove all the shackles of slavery and that long after the declaration of independence and in spite of their valiant efforts to simply be human, the best opportunity available to them is still being overshadowed by their identity in the plantation society.

The focus on higglering was pertinent for the case study of this research, which is the REDI project. The analysis of higglering serves as a reference for the REDI project as they both have a strong emphasis on marketing and access to markets. However, the post-slavery period of the late 19th century and 20th century provided other possibilities and opportunities of adjustment, apart from higglering, for the Jamaican women in general.

The following summary highlights kinship patterns, lodging-house, land ownership and political activism as some of the additional socio-economic factors that significantly influenced the well-being of both rural and urban women. Fox (2010) examines kinship patterns as survival strategies of rural women in Jamaica. Through what she describes as a gender system, she notes that such system survival was based on mutation over time even as key factors, such as class and colour, continue to be enduring features. Such gender system carries power and meaning, which are transferred from one generation to the next and as a result it can enhance one’s power or heighten a state of deprivation.

The lodging-house during the period of post-emancipation was analysed by Kerr (1995) as a socio-economic opportunity for women in both rural and urban areas. Lodging-house was a feature of the predecessor of the current tourist industry. Lodging-house was a hospitality service that was initially provided by white Jamaicans and was later dominated by free coloured and black female operators. These women ventured into lodging-housekeeping as a means to meet their economic and social needs mainly because they had limited economic opportunities and also their social

status gave them access to this business venture. Yet the author insists that the dictate of their circumstances failed to sufficiently reveal the reasons for their actions in spite the beneficial outcomes. Some of them inherited taverns and lodging-houses, while many of them turned their houses into lodging-houses. They chose strategic locations to offer these services – land routes and sea ports – where the demands were high. Lodging-house keepers provided services such as accommodation, food, drinks, laundering, prostitution, meal catering and dances as community entertainment. Some operators diversified their businesses to include bakeries and shops. Kerr (1995) reveals that the income of lodging-house keepers was substantial as they were paid the same as artists and master tradesmen and more than pilots, miners and master mariners. However, the author found it difficult to confirm or deny the assumption that these businesses 'institutionalised the sexual exploitation of these women' (Kerr 1995, 198). Yet she agreed that 'many lodging-house keepers were established by their white lovers and their businesses maintained by the support of white men who also formed the bulk of their clientele and for whom they provided sexual favours among other services' (Kerr 1995, 198). Nevertheless, Kerr was reluctant to judge the state of the relationship between customer and service provider. She was even more reluctant to declare whether or not their economic opportunity was a free choice.

Landholding was another important symbol of economic and social development for all Jamaicans. This standard was a continuation of the plantation society. However, not every Jamaican had access to land, and least among them were the rural population. Satchell (1995) reveals the contribution of women to the development of the rural economy through the transfer of landholdings. During the early period of emancipation (1866-1900), the plantation system was trending downwards but also managed to rebound and assumed control over majority of the land on the island. Therefore, even though the people were free they had no real access to this important source of development. Satchell (1995, 213-4) notes that the majority of them had to eke out a way between the ebb and flow of the plantation system, whose 'stranglehold on land seriously restrained the development of the peasantry during this period.' The author, although faced with limited data due to the absence of details on the lives of women, was able to gather sufficient information on women and landholding to identify their contribution to peasantry in Jamaica. While noting that women themselves had legal hurdles – such as Law 43 of 1663, which excluded married women from land

ownership – these women still managed to contribute to the development of rural population. This they did through the transfer of land to rural smallholders, land which they had acquired during the period of economic hardship as traditional planters were forced to sell their estates and plantations to clear debt or due to lack of capital for reinvestment. In spite of the 'socio-economic power and prestige' attached to land ownership, the group of women transferred 225,699 acres and obtained a mere 70,872 acres (Satchell 1995, 229), which the author considers would have been an act of improvidence in the context of rural development. Satchell notes that there seems to be no logical reason for this choice that was made by the group of women because 'disposing of these properties indicated an erosion of the economic and social power and prestige these women held in the society' (Satchell 1995, 229). However, she speculates economic hardships, mass migration of men to overseas plantations, greater domestic responsibilities as well as the crowding out of the smallholders by the plantation sector all combined to force women to seek other economic opportunities apart from plantation or subsistence farming.

Political activism was and still is another valuable freedom for women in Jamaica. Vassell (1995) explores the life of Daphne Rose Campbell and reveals her interests, issues of concerns and the goals she pursued as a political activist of the poorer masses during the 1940s and 1950s in Jamaica. Vassell (1995) notes that Campbell's main concern was with the challenges encountered in pursuit of the improvement of the economic and social conditions of working-class women in Jamaica, and how those challenges influenced their decision to participate in political activism. Her aim was to 'uplift the status of women, especially working-class women, and to alert them of their rights … rights to education, the right to a good living standard, the rights of their children to education and [she was concerned with women] having children without the support of fathers' (Vassell 1995, 328). She records how Campbell began building her capability for activism through her early encounters with the Young Women's Christian Association (YWCA) in Kingston, after moving from her rural community of Endeavour, Manchester. She referred to inspirations she got from the educational and social activities and from the leaders who were role-models at the association. She was further influenced by Edith Dalton-James, an educator and political activist of the People's National Party (PNP). Campbell expanded her political skills initially through the social organisations and groups such as the PNP's Jolly Girls Club, Jamaica Youth

Movement (JYM), Friends of the Trade Union Congress, the People's Educational Organisation (PEO).

Analysis of the literature indicates that access to these additional possibilities was often influenced by class and location of the women. Access to facilities and resources appeared to be strongly influenced by the rigid class system of the plantation society which in effect fostered the kind of poverty that was experienced by the rural population, who accounted for the majority of those classified as the lowest class – black and of African descent.

4.6 Summary

Regionally, there is an ongoing debate about several aspects of Caribbean development, one of which is women's development. To-date, no consensus has been reached in relation to the development of women. Feminists and gender scholars have provided practical tools from the diverse realities of Caribbean women for the creation of knowledge. . Salient to these ongoing deliberations are issues relating to downward adaptation, the legacy of the plantation society, the search for fruitful strategies to implement development, and a legacy of useful tools for the creation of meaningful knowledge that is relevant to the development of Caribbean women.

Examined through the lens of the capability approach, the oppressive and inhumane state of slavery was presented as the baseline of human development for enslaved women in Jamaica. The capability approach acknowledges all doings and beings, aimed at achieving freedom, as valuable. Legislations and policies of the slave plantation society facilitated various valuable doings and beings that were associated with freedom through various means such as with production, reproduction, wealth and material accumulation and social order. Within the restrictive environment of the plantation society the enslaved women navigated their humanity by applying some of those valuable doings and beings as strategies of resistance, adaptation and accommodation. It must be noted that some of their valuable functionings, such as motherhood, contributed to their state of despair. It was observed that even though their various responses to the oppression and deprivation on the plantation society were motivated by several personal and social goals, the legislative and policy framework of the plantation system created an enabling environment for the various behaviours

through which they sought freedom. The agency of the enslaved women was driven by their desire for freedom, not only personal freedom but freedom for their children and community. It was both their agency and the institutional framework of the plantation system that effectively facilitated aspects of social opportunities, economic facilities, protective security and other instruments of freedom.

Higglering was one of the instruments of freedom for enslaved women, especially those in the lowest class, poor black female slaves. Apart from being a professional activity, higglering provided these low class slaves with opportunities to be independent, to be relatively free and enhanced their mobility to travel across and within parishes. The effects of higglering on the lives of poor black female slaves epitomises triumph over adversity, in that, even though they were sold as slaves and travel the life-threatening voyage from African to the Caribbean, they still had something in which to put their hope and aspiration, that was higglering. This aspect of their lived experience was succinctly expressed in the Marley's (1980) *Redemption Song*:

> *Old pirates, yes, they rob I,*
> *Sold I to the merchant ships*
> *Minutes after they took I*
> *From the bottomless pit*
> *But my hand was made strong*
> *By the hand of the Almighty*
> *We forward in this generation*
> *Triumphantly…*

Through higglering these women became trading links between the rural and urban regions, gained personal income and contributed to the economic development of their slave owners and the national economy. The regulatory structure of the internal marketing system that facilitated higglering tended to be prohibitive while seeking to maintain social order. Still the governing structure was expansive as it promoted infrastructure and established permanent marketing facilities, although mainly in urban areas. Higglering was valuable to enslaved women because through participation in this profession they were able to experience relative freedom and independence as well as contribute to the development of their children and communities, three of their long term goals.

In spite of the relative progress of higglers during slavery, both through the agency of the enslaved and freed black women as well as the policy and legislative framework, poor black women in independent Jamaica continue to struggle to secure higglering as a viable economic facility that can provide them with the socio-economic freedom that they desire. Their personal and social goals remain the same across centuries but their freedoms continue to be restricted by prohibitive legislations and underdeveloped policies, which have dwarfed this local industry and undermined its potential to make a more significant contribution to human development in Jamaica.

In such a context the poverty experienced by rural women in Jamaica cannot be viewed merely as lack of income and limited consumption, it must include the barriers created by the legislative and policy framework and the fact that 'the constant, day-to-day hard choices associated with poverty in effect "tax" an individual's psychological and social resources. This type of "tax" can lead to economic decisions that perpetuate poverty' (World Bank 2015, 80). The underdeveloped state of the institutional component of of higglering has been a major contributor to the persistent poverty that confronts rural women in Jamaica. Additionally, at the institutional level, the plantation society fostered a rigid three-tiered class structure, with discriminatory practices of resource allocation and access to services. This discriminatory class structure enabled the Whites to remain at the top; it kept the mulattoes in check in the middle, while maintaining the low status of the blacks.

Chapter 5. Case Study: Rural Economic Development Initiative Project (REDI)

5.1 REDI and its predecessor

In the previous chapter, the historical perspective of the transformation experienced by women in Jamaica was examined. A key approach to their transformation from property to human was to engage their social and psychological functionings to a greater extent than the other aspects of their capability. In order to discuss the relevance of REDI, an overview of its predecessor was deemed to be necessary. REDI was embedded in the community development approach. This approach to development, which underpins most of the projects of the Jamaica Social Investment Fund (JSIF), goes back to the Jamaica Welfare Society (JWS), which started in 1937 and pioneered community development in Jamaica (Girvan 1993).

Since the REDI was implemented using the community development model, some of the implicit intentions of this project could be drawn from an overview of the aims and objectives of the JWS. Such knowledge may provide greater insights on the impact of the REDI.

The JWS was born out of discontentment and a rejection of the development path of colonialism and a desire to form a nation: a new Jamaica (Girvan 1993). The JWS's greatest discontentment was with the disjointed social structure, which was a continuation of the plantation society in which the people were divided into three distinct racial groups (Girvan 1993; Sherlock 1993). Hierarchically, at the top were a small group of white leaders, secondly, another small group of coloured business owners, and at the bottom a large group of black people with no clear identity, who were politically excluded, socially detested and marginalised (Sherlock 1993).

One of the objectives of the JWS was to address the social division and lack of identity of the large group of blacks (Girvan 1993; Sherlock 1993). It was preoccupied with creating and weaving the social fabric of a newly formed nation. The main ideology of Norman Manley, D.T.M. Girvan and the other pioneers of the JWS was that the need for self-improvement was of utmost priority for the largest group in the new nation and the fulfilment of this need would enable other forms of development, such

as economic and physical improvement. Six guiding principles formulated to achieve self-improvement at the community level were to: secure the cooperation of existing community leaders; gather and analyse information about local conditions; build organisation and cooperation at the community level; encourage character and leadership formation; cater to the humblest members of the community; and use existing facilities wherever possible (Girvan 1993).

Girvan (1993) believes that 'building a better community depends first and foremost on the desire of the citizens for self-improvement. This desire may be found in most communities in varying degrees; in all it can be aroused and stimulated' (Girvan 1993, 27). His concept of development is one that emanates from an individual's need for self-determination, which is then shared, nurtured and grows at the community level and then to the wider society and nation. He theorises that lack of self-determination in an individual can be fulfilled through integration in a group or community with members that have already met that need to a certain level, if not completely.

The process of community development, envisioned by the pioneers, was to first 'secure the cooperation of the local 'key' people, and to gather basic information about the community' (Girvan 1993, 27). The key people were community members who valued community development as a public good and not for private gains, such as teachers, religious leaders, public servants, voluntary leaders, and voluntary community members with relevant skills and knowledge. The pioneers assumed that these local 'servant leaders' who have already achieved some level of self-improvement, would then form a community committee, which would govern and guard against the 'tragedy of the commons' – including exploitation of the poorest members (Girvan 1993; Sherlock 1993).

The first task of the committee was to coordinate 'a Social Survey… [of] the salient facts about social and economic conditions, and community structures' (Girvan 1993, 27). This survey was the baseline for community development and guided all future interventions, with the priority being to improve and expand all aspects of human capabilities and leadership capacity within the community. Each community was expected to have a group to build the capabilities and capacity. Special care was given in formulating each group, and the pioneers warned that 'no new group was to be

organised unless and until there was local leadership that could be relied upon' (Girvan 1993, 28). The local 'servant leaders' in each community would receive structured training until they developed the capacity to effectively lead their group. In this development plan, there was special emphasis on nurturing children and youth. While building the capacity of leaders, the process should contribute to sharing the desire for self-determination, followed by the availability of numerous opportunities to fulfil that desire, especially for the poorest individuals.

The pioneers recognised communities as the engines of national development and individuals, including the poorest, as the drivers. The application of the six principles was the blueprint to achieve community development with the aim of improving the spirit, mind and body of each individual peasant (Girvan 1993). The pioneers affirm that:

> *All efforts at 'Building Better Communities' must be based on character building. This is not only of prime importance, but must be the underlying object of every activity. Spectacular efforts are usually only a 'flash in the pan', and in many cases useless when judged by the amount of permanent benefit achieved* (Girvan 1993, 28).

The JWS therefore embarked on a mission in 1937 to address first and foremost the psychological and social dimensions followed by the physical and economic deprivations of rural population, with self-determination and social cohesion as the fundamental building blocks. The implementation of this model of community development included the transmission of the six principles through all agents of socialisation – the family, school, mass media, peer groups, religion, workplace, and the government. Every rural Jamaican was given numerous opportunities and choices to participate in self-improvement, community development, and nation-building.

After 11 years in existence (1937-1948), JWS developed a 'sense of empowerment, of hope, and of participation in nation-building … among the previously neglected rural population' through the creation of activities and initiatives such as 'study and education in literacy, nutrition, and cooperative organisations; mutual aid groups in land preparation and housing construction; craft training and development; and savings clubs and credit unions' (Girvan 1993, 219). The impact of the JWS resulted in both intangible and tangible achievements for rural Jamaicans. This model of community development, which was pioneered in Jamaica, was implemented in other

countries in the Caribbean and Latin America with varied success (Girvan 1993). During the period 1943/44 the JWS underwent structural changes and was renamed the Jamaica Welfare (1943) Limited. By 1949 the community development approach was amended, legislated and became a policy for national development – Jamaica Social Welfare Commission (JSWC), Law No.19 of 1949, still with a special focus on the rural poor. This law has since been repealed and was replaced by The Jamaica Social Welfare Commission Act 15 of 1965 (Ministry of Justice 1973).

The program evolved and diversified both staff and activities. By 1961 the levels of social and economic challenges in urban areas warranted the involvement of the JSWC. With the declaration of independence in 1962, the Commission embarked on the development and promotion of a new concept of citizenship in both rural and urban areas. The new and independent citizenship shall embody:

> *The organisation and training of youth; the strengthening of family life; the elimination of illiteracy; the respect for hard work and the dignity of labour; the increase of productivity in agriculture and industry; betterment of labour and management relations; the promotion of practical skills …* (Girvan 1993, 235).

However, in 1961, 24 years after the establishment of the Commission there were signs of a 'breakdown of national consensus and the rise of social conflict' (Girvan 1993, 401). The development work of the Commission declined in the 1980s, and the aim of creating a new citizenship with inclusive development that would benefit and possibly unite the three distinct groups in the newly independent nation was derailed. The establishment of the Jamaica Social Investment Fund (JSIF) in 1996 symbolised a resuscitation of community-based approach to national development (JSIF 2014).

Jamaica Social Investment Fund (JSIF) was a response by the Government of Jamaica (GOJ) to the growing deficit in social cohesion, declining living conditions and limited government resources. It was initially a five year (1996-2001) project with a similar goal as the Commission, to address the unmet needs of the poor. The main objectives (Rao and Ibáñez 2005) (World Bank 2002) were to:

- Deliver basic services to the poor through an efficient, demand-driven and complementary mechanism;
- Enhance social development by sourcing and directing additional resources into social infrastructure;
- Improve economic infrastructure and services;

- Increase the institutional capacity of governmental and nongovernmental entities to design, implement, and manage small-scale community-based projects;
- Contribute to the development of self-determination and self-actualisation of the poor.

The JSIF has kept alive the vision of the Jamaica Welfare Society (JWS), and even when self-improvement of the individual is not explicit in a project, the assumption seems to be that it is an inherent human quality and the community approach to development would in some way arouse and stimulate self-improvement. Therefore, evaluations of the initiatives of the JSIF should aim to measure or at least identify the presence of this central outcome.

5.2 Overview of the Rural Economic Development Initiative Project (REDI)

The Rural Economic Development Initiative project (REDI) was a project of the Government of Jamaica (GOJ). REDI was implemented by the Jamaica Social Investment Fund (JSIF) in partnership with the International Bank for Reconstruction and Development (World Bank) (World Bank 2009a). This initiative was a US$17.5 million investment in rural development, based on projected contributions of US$0.5 million from the GOJ, US$2 million from rural residents and entrepreneurs, and US$15 million from the World Bank (World Bank 2009a)Implementation of REDI effectively began 25 January 2010, with a proposed completion date of 31 July 2016, but the actual completion date was one year later on 31 July 2017 (World Bank 2017).

The rationale for this six year project was the need to stimulate rural economic growth as a path to enhance national development (World Bank 2009c). This path to development focuses on improving the quality and quantity of products and services produced by rural residents in their communities to meet local and world markets standards (World Bank 2009c). Competitive prices and adequate returns on inputs are imperative to the envisioned rural economic growth (Jamaica Social Investment Fund 2009). The motivation for REDI was based on persistently high rates of rural poverty over several decades, untapped potential in the agriculture and tourism sectors, and evidence of the inability of the GOJ to fulfill debt obligations (World Bank 2009c). According to the World Bank (2009), its accumulated knowledge gained from participating in rural development in other countries, along with available financial

and technical support made the financial institution a suitable partner in the implementation of REDI.

Project Development Objective (PDO) Indicators

1) Number of participating rural enterprises that realize an increase in sales.
2) Number of participating rural enterprises functioning as registered business entities one year after final disbursement.
3) Number of direct jobs created in rural communities receiving project assistance.
4) Percent of critical infrastructure subprojects that achieve their expected results for improvement in the value chain.

Intermediate Results (IR) Indicators

1) Percent of rural enterprise participants who are women.
2) Number of rural enterprises that have been selected competitively and have started (or enhanced) their operations.
3) Percent of rural enterprise participants who are youth (less than 30 years old).
4) Number of beneficiaries (individuals or groups) benefiting from improved infrastructure and management.
5) Number of beneficiaries (individuals or groups) benefiting from improved marketing systems.
6) Number of beneficiaries (individuals or groups) benefiting from improved management systems.
7) Number of participating rural enterprises integrating environmental and social good practices into their business operations.
8) Percentage of participating rural enterprises integrating a business community plan for during and after a disaster.
9) Number of institutions' staff trained in technology and provision of rural business support services.
10) Number of participating rural enterprises using the services of the national institutions before and after the project intervention.
11) Percentage of subprojects that are processed and implemented in accordance with the time frame in the Operations Manual.
12) Percentage of loan disbursed according to schedule.

Figure 5.1 Success Indicators of REDI
Source: (Jamaica Social Investment Fund 2009); World Bank (2011)

Improved market access for rural agricultural and tourism entrepreneurs was the central objective of REDI (Jamaica Social Investment Fund 2009; World Bank 2009c). Success of REDI was measured by 16 economic indicators, as outlined in Figure 5.1 Success Indicators of REDI

Creation of new employment opportunities and increased income for rural population were the long-term goals of REDI (Jamaica Social Investment Fund 2009; World Bank 2009c). These goals were to be achieved using three key strategies and allocated funds – rural subprojects in agriculture and tourism with US$14.22 million, national technical assistance and capacity building with US$1.25 million, and US$2.03 for

project management (Jamaica Social Investment Fund 2009; World Bank 2009b). The subprojects' strategy focused on revenue generation and provision of infrastructure, marketing and management needs. The technical assistance strategy aimed to strengthen the support framework of government agencies that were mandated to facilitate rural development. These agencies included Rural Agricultural Development Authority (RADA) and Tourism Product Development Company (TPDCo). Project management, the third strategy, sought to ensure the effective implementation and monitoring of REDI (JSIF 2009; World Bank 2009c).

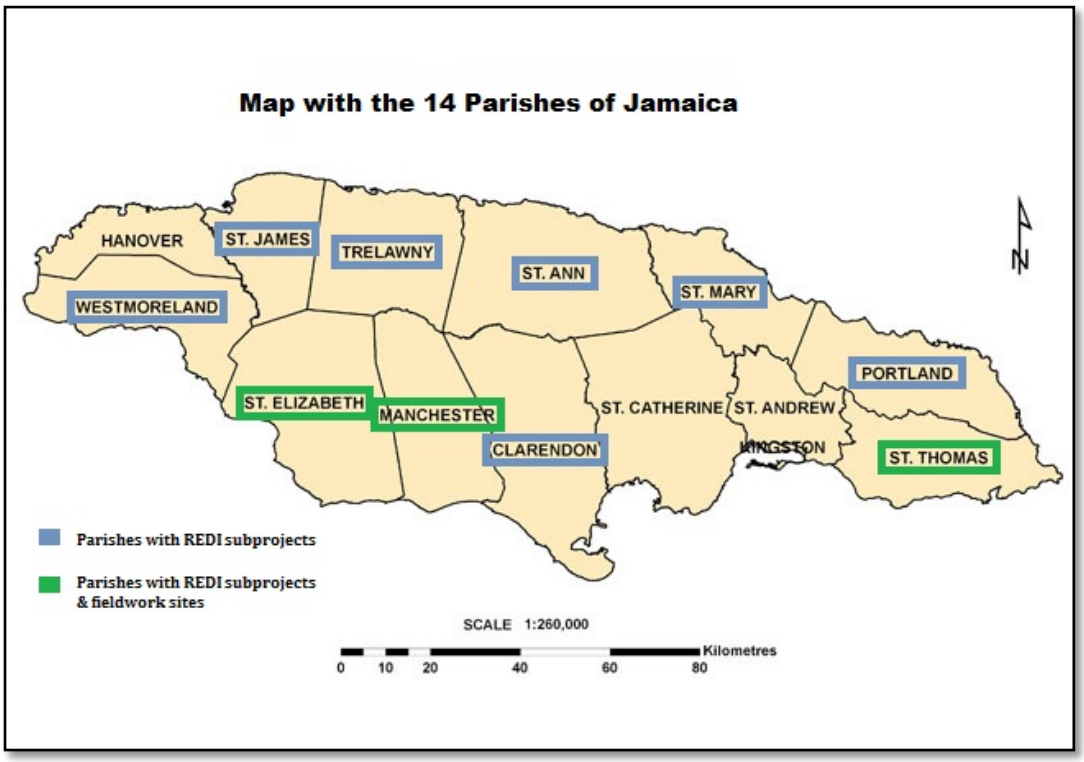
REDI utilised a public-private-civil society partnership approach to implementation and monitoring, while formulation was based on a top-down model (Rhiney 2013). The agriculture and tourism sectors were the two main pillars upon which the project was developed. Existing connections between these sectors were believed to be both a pool of untapped potential and the engine of creativity and productivity for rural growth and development (World Bank 2009c). Activities aimed at unearthing the productive potential of these sectors included the provision of enterprise-level financial and technical support; enhanced financial management of rural enterprises; increased access to technical innovation and business support services; and training in technical and environmental skills development. Additionally, efforts to strengthen the marketing component of these enterprises consisted of assistance in developing market-orient small-scale infrastructure. The sustainability of rural enterprises was addressed through capacity building of national organizations such as RADA and TPDCo (JSIF 2009; World Bank 2009c).

Approximately 27,500 rural residents or two per cent of the rural population were expected to benefit from REDI over the six years (World Bank 2009c). The main beneficiaries were expected to be 7,500 agricultural producers and providers of tourism products. Another 20,000 rural residents were anticipated to be recipients of outcomes from institutional strengthening in key government agencies such as RADA and TPDCo (World Bank 2009c). Women and youth were estimated to account for 35 and 15 per cent, respectively, of the main beneficiaries (World Bank 2009c). Implementation began with pilots in eight parishes, namely, Clarendon, Manchester, St. Elizabeth, Westmoreland, Hanover, St. James, Trelawny, and St. Ann (Rhiney 2013).

The selected beneficiaries were groups organised by geographic location and economic interest. Three of the main criteria for group participation in REDI were, one, the enterprise must be legally registered, and two, at the time of grant approval it should be currently operating as a micro or small business with an asset value ranging from US$10,000 – US$100,000 (Jamaica Social Investment Fund 2009). However, that value should not include land or existing infrastructure. Additionally, the annual investment of the enterprise should not be more than US$125,000 each year (Jamaica Social Investment Fund 2009; World Bank 2009c).

The subproject component consisted of two types of initiatives. Type-A was an income-generating entrepreneurship in agriculture and tourism with access to maximum funding of US$50,000. Type-B focused on the provision of supportive infrastructure, marketing and management with access to a maximum of US$200,000 (Jamaica Social Investment Fund 2009; World Bank 2009c; Rhiney 2013). The research for this thesis examined the Type-A subprojects. In this component all beneficiaries were required to make a 20 per cent community contribution to the implementation of their subprojects, whether in cash or kind. Community contributions of the beneficiaries were provided at various stages in the project cycle, such as during formulation, implementation and evaluation (World Bank 2009c; Rhiney 2013).

Type-A initiatives were in two categories, agriculture and tourism. Agricultural entrepreneurship encompassed production of various crops and the connection of products to relevant markets. It was anticipated that profits from these entrepreneurial activities would be reinvested into the farm to scale-up innovations (such as green houses, breeding stock improvement, new crops and varieties, counter-seasonal production methods) micro-marketing infrastructure (such as storage, fish cleaning/filleting facilities) and equipment (such as packing equipment) (JSIF 2009; World Bank 2009c). Tourism entrepreneurship focused on income-generation through the sale of historical, cultural and organic products and services by rural enterprises. Major tourist centers were the target markets for these products (JSIF 2009; World Bank 2009c). Growth of new and existing enterprises was expected as a result of profitable income-generation with the initial rural enterprises (World Bank 2009c).



Entrepreneurs of Type-A initiatives were not individuals but rather legally registered groups. Groups acquired legal status via two routes. They either registered with the Department of Co-operatives and Friendly Societies in the Ministry of Industry Investment and Commerce or had to be associated with or be sponsored by a legally registered community organisation. Legal status was acquired either before grant application to REDI or after provisional approval.

5.3 REDI: Outcomes, achievements and challenges

The implementation of REDI over the past eight years (2010-2017) has contributed to the operation and sustainability of 93 rural enterprises. Of these, 69 community ventures have unlocked the potential in the agriculture sector while the tourism sector was enhanced by the contribution of the 17 tourism subprojects, and there were seven initiatives that simultaneously contributed to both sectors (World Bank 2017). These initiatives have benefitted approximately 1,357 producers, 16,700 direct participants and a further 51,700 indirect beneficiaries (JSIF 2014; World Bank 2017).

Figure 5.2 REDI subprojects and fieldwork sites by parishes in Jamaica
Sources: Abdulkadri (2013, 4), Rhiney (2013, 7)

It is believed that the outcomes of REDI have had an island-wide coverage with sub-projects in 10 of the 14 parishes in Jamaica, as illustrated in Figure 5.2 REDI

subprojects and fieldwork sites by parishes in Jamaica The parishes in which REDI subprojects were implemented are Clarendon, Manchester, Portland, St. Ann, St. Elizabeth, St. James, St. Mary, St. Thomas, Trelawny and Westmoreland. According to the World Bank (2017), REDI has a significant role to play in national development, given the fact that it is currently the only government project with a focus on rural development at the national level.

The intermediate results indicators measured progress towards achievement of the project development objectives in the short-term. All the targets had achieved mixed results as shown in Table 5.1.

In general, 42 per cent of intermediate targets were achieved, while the other 58 per cent met approximately half the intended goals. Overall, the highest achievement was the 51 per cent of women who were active in rural entrepreneurship. Approximately 70 per cent more women than what was expected had participated in REDI.

Table 5.1: Deliverables & Achievements of REDI (as at 30 Sept 2014 and 30 June 2017)

	Intermediate Results Indicators	Target	Results (as at 30 Sept 2014 – during fieldwork)	Results (as at 30 Jun 2017 – before project closure)
1.	Percent of rural enterprise participants who are women.	30%	51%	51%
2.	Percent of rural enterprise participants who are youth (less than 30 years old).	15%	21%	22%
3.	Number of rural enterprises that have been selected competitively and have started (or enhanced) their operations.	75	41	68*
4.	Number of beneficiaries (individuals or groups) benefiting from improved infrastructure and management.	14	24	3,500*
5.	Number of beneficiaries (individuals or groups) benefiting from improved marketing systems.	15	19	**
6.	Number of beneficiaries (individuals or groups) benefiting from improved management systems.	11	21	**
7.	Number of participating rural enterprises integrating environmental and social good practices into their business operations.	50	26	58
8.	Percentage of participating rural enterprises integrating a business community plan for during and after a disaster.	75%	56%	45*
9.	Number of participating rural enterprises using the services of the national institutions before and after the project intervention.	50	34	**
10.	Percentage of subprojects that are processed and implemented in accordance with the time frame in the Operations Manual.	60%	38%	60
11.	Percentage of loan disbursed according to schedule.	90%	48%	100%
12.	Number of direct jobs created in rural communities receiving project assistance	300	**	1,357
13.	Number of enterprises with new or improved products or services	40	**	64

Key:
Targets achieved
Targets not yet achieved

Source: Data adapted from the World Bank (2015, 2017)

Youth participation in REDI was also successful, as they accounted for 21 per cent of participants instead of the targeted 15 per cent. Improved infrastructure and management support benefited almost twice (24 per cent) the number of expected (14 per cent) enterprises. Similarly, more beneficiaries (19 per cent) welcomed the improvement in marketing systems instead of the expected 15 per cent.

Before describing the intermediate results indicators as at 30 June 2017, it must be stated that several changes were made to the intermediate results indicators. These changes were identified within the Implementation Status and Results Reports Seq. No. 10 and 12. The main changes were related to the end targets as highlighted below (Colleye 2015; World Bank 2014) The targets for:

- *Number of direct jobs created in rural communities receiving project assistance* **increased** from 150 to 300;
- *Number of beneficiaries (individuals or groups) benefiting from improved infrastructure and management* **increased** from 14 to 3,500;
- *Number of rural enterprises that have been selected competitively and have started (or enhanced) their operations* **decreased** from 75 to 44;
- *Number of enterprises with new or improved products or services* **decreased** from 78 to 40;
- *Number of participating rural enterprises integrating environmental and social good practices into their business operations* **decreased** from 50 to 40;
- *Percentage of participating rural enterprises integrating a business community plan for during and after a disaster* **decreased** from 75 to 40;
- *Number of beneficiaries (individuals or groups) benefiting from improved marketing systems* **was omitted**;
- *Number of beneficiaries (individuals or groups) benefiting from improved management systems* **was omitted**.

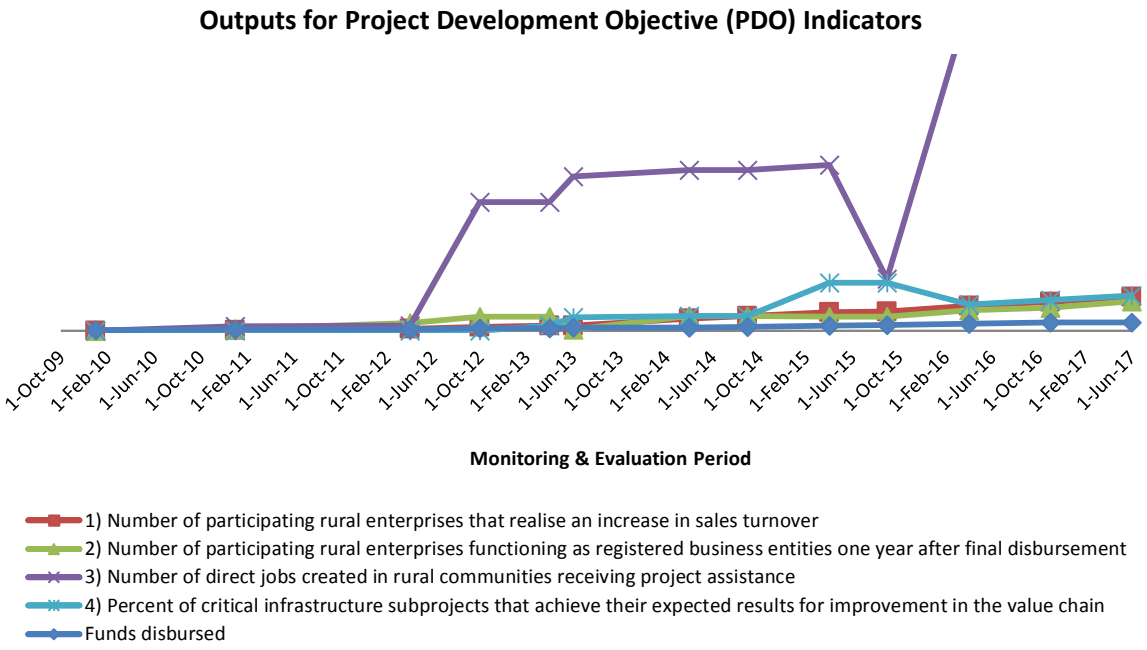


Figure 5.3 Outputs of the project development objective (PDO) indicators
Sources: World Bank (years 2009-2017)

Figure 5.3 Outputs of the project development objective (PDO) indicatorsillustrates the trend in the output of PDO indicators. All the indicators, except that related to job creation, exhibit a steady trend over the life of the project. Job creation remains the highest indicator, even with a sharp decline in September 2015. This decline in jobs – a shift from 300 in April 2015 to 94 within a five month period – can be associated with the completion of approximately 45 subprojects, and at the same time some of the existing projects had just completed their first year without direct support from the project (World Bank 2015). The sharp decline was followed by a comparatively sharp increase in the number of jobs to 591 by April 2016. During the same period 23 subprojects began implementation, and this may have contributed to the increase in job creation.

Another important measure of success for REDI was timely disbursement of the loan. However, loan disbursement was the least successful target by mid-term, with only 48 per cent of the intended 90 per cent of funds disbursed by September 2014, as revealed in Figure 5.4 Trend in the disbursement of project loan as at 30 September 2014. This reveals that 52 per cent of the money allocated was not spent at the time projected. In other words, with almost twice the number of women participating in REDI more than

half the funds remained unutilised midway in the implementation phase of the project. However, this disbursement relates only to the contribution of the World Bank and excludes the contribution of the participants and the GOJ.

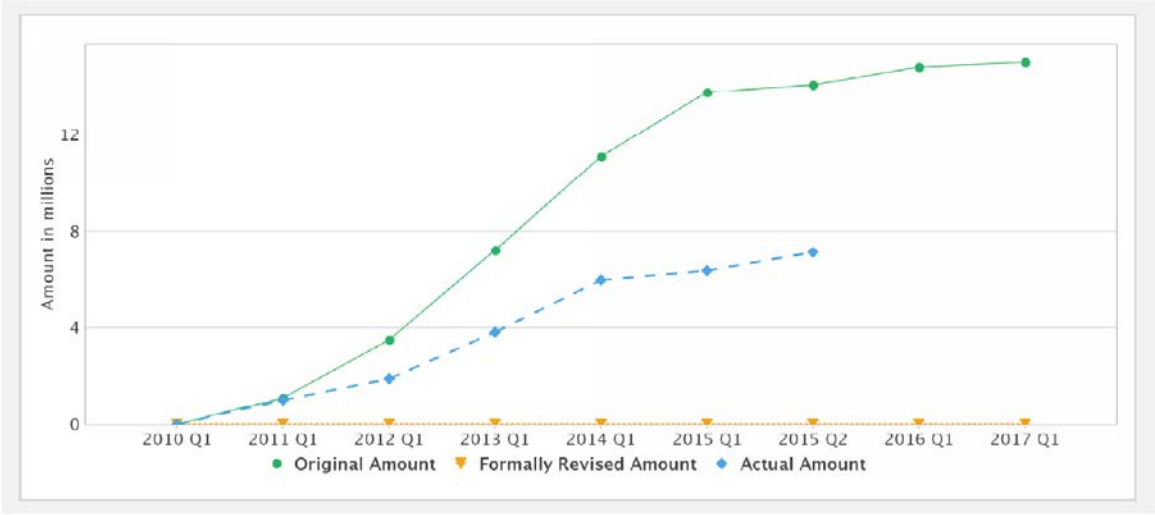


Figure 5.4 Trend in the disbursement of project loan as at 30 September 2014
Sources: Figure retrieved from World Bank (2014, 8)

Disbursement of funds to project participants generally follows the successful completion of the competitive selection process, approval for environmental management and social good practices, all within a specified timeframe. All these participation criteria are only half the requirements through the process of accessing the grant, which contributed to the slow pace of disbursement (Rhiney 2013). All funds were disbursed by the 30 June 2017 as indicated in Figure 5.5 Trend in the disbursement of project loan as at 30 June 2017.

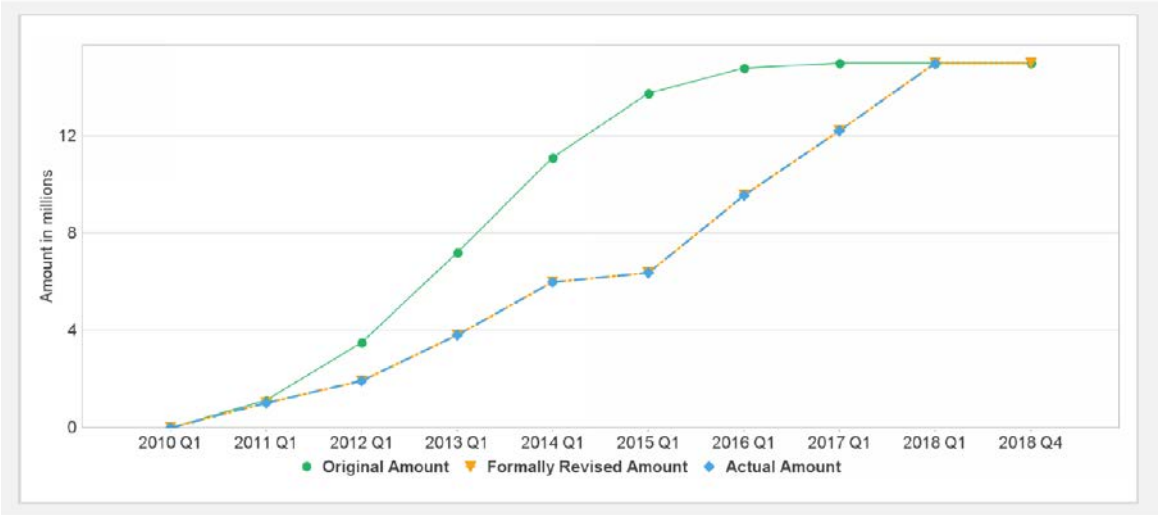


Figure 5.5 Trend in the disbursement of project loan as at 30 June 2017

Sources: Figure retrieved from Charlier (2017, 9)

The provision of support to the entrepreneurs was another feature of the subproject activities and as at 30 June 2017, the institutional support staff members trained exceeded the target of 50, with an additional 28 members made available to assist the newly established enterprises. As at 30 September 2014 about 50 per cent of entrepreneurs chose to engage with the services of those institutional supports. However, the indicator measuring the number of enterprises that have utilised those institutional supports was omitted in the final report on the project results. In general, success was more evident in targets that required participation, while those that were time-bound and depended on process thinking and assimilation of formal entrepreneurship had lagged behind.

5.4 Review of previous evaluations of REDI

REDI was rated by the World Bank as moderately unsatisfactory for progress made towards the achievement of the project development objectives as at 30 September 2014, as illustrated in Figure 5.6 Overall rating of REDI as at 30 September 2014. Such low rating was influenced primarily by a shortfall in the sustainability indicator. According to the World Bank (2014, 2), this shortfall was the result of delays in the startup phase 'where considerable time [was] spent on subproject design, selection and contracting.' It must be noted that this overall rating of unsatisfactory was the same for the past two consecutive review periods (Colleye 2013, 2014). Pierre Olivier Colleye (2013, 2014) was the World Bank's team leader for the supervision mission for REDI at the time of these reviews. Colleye (2013, 2014) cited slow pace of implementation and lengthy processing time as the main factors that contributed to the downgrading of REDI.

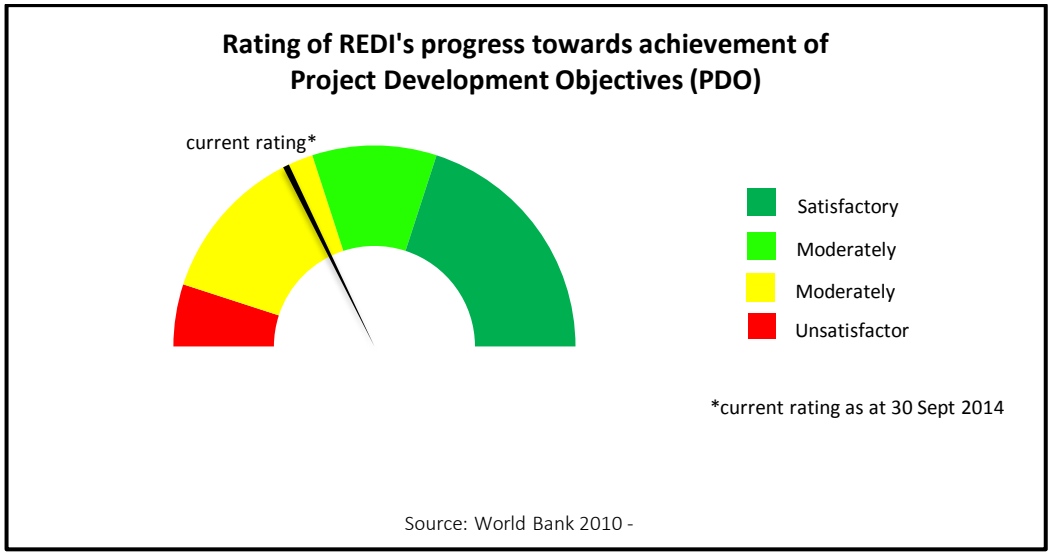


Figure 5.6 Overall rating of REDI as at 30 September 2014
Sources: Reproduced from (Colleye 2013, 2014)

One year later the report for September 2015 revealed several changes to the project development objectives (PDO) and the intermediate results indicators (IRI). The most notable changes were reductions in the figures for several end targets, increases in the figures for two end targets, transfer of indicators from PDO to IRI and a new IRI (Colleye 2015). Other minor changes were identified in subsequent reports but the changes indicated in the September 2015 report remain the general format for all reports, including the final report on 30 June 2017.

After eight years (2010-2017), the REDI closed on 31 July 2017 with an overall satisfactory rating from the World Bank (Charlier 2017). Garry Charlier (2017, 2), the World Bank's team leader for the supervision mission for REDI at the time of this review, claims that:

> *The project has improved market access for micro and small-scale rural agricultural producers and tourism product and service providers by improving access to markets, increasing the number of rural enterprises being legally registered entities, increasing income of participating rural enterprises and creation of direct jobs — including for women and youth. All three indicators for the Project Development Objective have fully reached or exceeded the end-of-project targets. All thirteen intermediate result indicators have fully reached (3) or exceeded (10) their targets.*

The report further indicates that at the end of the project associated overall risks were moderate, with threats related to the technical design and policies being moderate,

institutional capacity for implementation and sustainability was moderate, and risks related to the stakeholders were generally low (Charlier 2017).

The strengths of REDI identified by the World Bank suggest that the project was beneficial to a large number of rural residents in Jamaica (Charlier 2017). However, those successes relate mainly to the quantifiable aspects such as numbers of active enterprises, numbers of project proposals received, numbers of beneficiaries, and the amount of funds disbursed (Charlier 2017). While these indicators were critical signposts during the implementation of the project, they provide little information on the actual impact of REDI on the participants. Additionally, given the fact that REDI was aimed at reducing rural poverty, those indicators were inadequate to show or even identify the actual nature of the poverty experienced by rural citizens in Jamaica. Furthermore, the monitoring and evaluation reports would have been far more useful than being a score-sheet if they had captured the process of development associated with the participants and their subprojects. Information of that nature could then be used to enhance the specific capabilities of the project participants and thereby contribute to the sustainability of the sub-projects in the long term.

According to the World Bank (2017), success of REDI depends on maximisation of grant funding by beneficiaries within a specified schedule. Most of the criteria sought to ensure financial feasibility and economic viability of the rural enterprises as well as offer entrepreneurs a new business management approach (Charlier 2017). Abdulkadri (2013) conducted an external independent mid-term evaluation of the economic dimensions of REDI using 12 subprojects. He found that 'all of the subprojects demonstrated short-run profitability with positive gross margins showing that once the JSIF investment is made, subprojects are able to cover their operating costs' (Abdulkadri 2013). However, he found that in the long run, 'only six subprojects [were] economically viable, four of which [were] agriculture sector subprojects and the remaining two [were] rural tourism subprojects' (Abdulkadri 2013). Their projected viability was based on their high internal rate of return (IRR), which indicates the potential of the subproject to cover capital costs and remain profitable or breakeven, once the interest rate on payments remain the same or decline (Abdulkadri 2013). For example, the Prospect Pig Farmers Association with an IRR of 20 per cent will remain profitable in the long-run and breakeven after eight years; and the Treasure

Beach Women's Group with an IRR of 12 per cent will remain profitable and break-even in 10 years – once all current conditions remain the same (Abdulkadri 2013). Abdulkadri (2013, 23) argues that 'the value of investments made in individual subprojects, in most cases, exceed what the venture could economically finance at 12 per cent discount rate.' In view of this oversight on the part of the project management, Abdulkadri (2013) puts forward two recommendations: first, to reduce the discount rate to eight per cent and second, to allow the subprojects to be in operation for approximately 15 years before conducting a financial and economic analysis.

Vital as this economic approach is to expanding opportunities for a better quality of life for rural Jamaicans, it overlooks other basic life goals. Studies reveal that most rural communities in Jamaica operate more as a communal society in which residents also value meaningful relationships, community cohesion, as well as reproductive roles and responsibilities (Mohammed 2000; Innerarity 2000). These other life goals may have significantly affected by the time allotted to their enterprises and how they spent the grants and profits. Hence, the implementation of REDI not only offers a new way of doing business but also requires a new way of living for rural Jamaicans. How will they adjust their life goals and still ensure the viability of their REDI subprojects?

Rhiney (2013) conducted a broader mid-term evaluation with 57 participants to understand the business development dimension of REDI in relation to the effectiveness, efficiency and timeliness of implementation. A total of 53 subprojects and 35 community groups were represented by the sample of participants. This third evaluation, while similar to the other two evaluations that focused on business development, was different because the participants were the main source of knowledge.

Effectiveness of REDI was measured by the number of targets achieved, demographics, spatial distribution, and ownership of subprojects by entrepreneurs. REDI was rated as being very effective in the achievement of targets because it exceeded all the mid-term goals, except for the number of subprojects implemented within the specified timeframe (Rhiney 2013). Failure to achieve this target was mainly attributed to difference in time between the intended 9 weeks and the actual 24 weeks it took to complete the preparatory phase of most subprojects (Rhiney 2013).

The sample size of 53 subprojects represented the total population of approved subprojects at the time of evaluation (Rhiney 2013). However, it was not clear whether or not the 57 participants were also representative of the total subproject participants. Demographically, REDI appears to be effectively heading towards the targeted range of participants of (65 per cent) mainly older men, 30 per cent women, and 15 per cent youth, except for the high percentage (15.8) of senior citizens who are active participants.

Spatially, although subprojects were in 10 of the 14 parishes after three (3) years of implementation, the two pilot parishes of Manchester and Saint Elizabeth accounted for a large proportion (60 per cent) of the subprojects. Half-way through implementation most of the resources are still concentrated on the pilot initiatives. It seems to be that REDI has not been able to effectively simulate the pilot subprojects in the other parishes. Or is REDI still at the pilot phase? What is the evidence that the pilots were effectively executed? What are some of the lessons learnt from the pilot subprojects? Evidently, one lesson is that the potential to enhance rural tourism remained untapped, with only 25.7 per cent of subprojects in tourism and the majority (71.4 per cent) concentrated in agriculture (Rhiney 2013).

Ownership of subprojects by participants, an indicator of sustainability and long-term viability of project impact, was another measure of the effectiveness of REDI (Rhiney 2013). This was assessed based on expressed desire of participants, their response to the 20 per cent community contribution and participation in decision-making. A large majority (74 per cent) of groups displayed autonomy and a willingness to take risks to sustain their initiatives beyond the project life cycle. Yet approximately 20 per cent of mainly newly formed groups exhibited high levels of caution and a need for broader institutional support. Sourcing the 20 per cent community contribution in cash was challenging during the planning phase for about 60 per cent of groups but during the implementation phase they contributed a tremendous amount of sweat equity that was quantified. This activity coincided with group formation and establishing trust coupled with the fact that most participants generally had limited access to financial resources. Rhiney (2013, pg. 51) believes that the socio-economic, political and cultural contexts of the participants influenced their response and he cautions that devaluing these settings ‘runs the risk of directly excluding some of the most vulnerable segments of

Jamaica's population from the REDI project.' These settings can provide insights into some of the exogenous and endogenous factors that could contribute to the long-term sustainability of REDI.

Endogenous factors identified by Rhiney (2013), which could impact REDI and the entrepreneurs included strong social networks, strong farming traditions, large labour pool, unique cultural assets, access to natural resources, and high levels of biodiversity and endemism. Additionally, he suggests that factors that could have an effect on the desired outcomes of the subprojects were weak institutional capacities, poor culture of cooperation and group farming, low levels of social capital and trust, lack of skills training for members, lack of desire for farming from youth, tenure insecurity, limited application of technology, and poor farm management practices.

Exogenous factors identified were opportunities for technology transfer, research and development, new and emerging niche markets, and exposure to capacity building and skills training. Additionally, the beneficiaries were aware of the threats of natural disasters, high levels of praedial larceny, high competition from imports, poor rural road infrastructure, high costs of energy and raw materials.

Participation in decision-making by entrepreneurs and community groups was generally limited (Rhiney 2013). For example, group members were prohibited from direct contact with contractors, they were not allowed to choose the contractors for their initiatives as dictated by the implementing agency (JSIF), and a consultant was contracted as the intermediary agent between the contractor and group members. Two procurement approaches were applied in the implementation of REDI, either direct procurement by JSIF or community based contracting (CBC) in which the community groups decide as to the goods and services to procure. Nevertheless, that function was not performed by the community groups but rather contracted out to a consultant who makes decisions for the group, which reduced their autonomy and increased their dependence on JSIF. Approximately 35 per cent of community groups expressed dissatisfaction with this failure in the implementation process.

In terms of efficiency, Rhiney (2013) states that 63 per cent of participants found the application process to be very difficult, and more than half of that group of informants

were newly formed and had not yet developed their capacity for enterprise development. Community based contracting (CBC) approach was lauded for its ability to build self-determination and augmenting local capabilities, however, it was not efficiently modeled during implementation (Rhiney 2013). The participants expressed general satisfaction with the amount of grants, training workshops and capacity building strategies, marketing interventions, as well as a high level of satisfaction with the support provided by REDI team members.

As with effectiveness and efficiency, the timeliness of the implementation process was mixed. While 26 per cent of proposals were approved within the projected timeframe (between 15 and 25 weeks), it took JSIF between 34 to 100 weeks to approve 49 per cent of the subprojects. Delays from consultants, coupled with the high volume of applications and limited number of project team members contributed to a longer time for the approval phase. Misunderstanding, difference in communication and a high response rate contributed to derailing the implementation timeframe.

The need for a longer timeframe for the implementation of REDI is the common denominator in all three evaluations. However, these evaluations were unable to explain why more time was required to complete the implementation of REDI and most importantly, none of them clearly explain how REDI has been able to or will be able to reduce poverty in the lives of rural citizens and what role these citizens can play in their own development. At this point it is still unclear whether REDI has the capability to improve the quality of life of rural Jamaicans but it is evident that this initiative has significant potential.

5.5 REDI and development as freedom

The evaluations above provided a great deal of information about the economic components of REDI and the potential of the tangible outcomes. Nevertheless, a broader knowledge base with more in-depth information about the actual condition of poverty was required, given the fact that all current evaluations of REDI were unable to provide such evidence. This knowledge was noted in the evaluation as critical for development initiatives because of the nature of persistent poverty in rural Jamaica (Rhiney 2013).

Internally driven prosperity was envisioned by the architects of community development in Jamaica (Girvan 1993). This plan was informed by a long history of deprivation in many forms, including economic, social, psychological and physical. Long ago in Jamaica it was believed that community based development has the potential to address these dimensions of poverty. In fact, previous literature review indicates that historically, women in Jamaica utilised greatly their social and psychological functionings in their development. None of the three evaluations assessed how REDI has expanded the social, psychological or the physical capabilities of the participants in general, nor specifically for rural women.

Furthermore, too much emphasis was on the business development component of REDI and not enough on the human development aspects, wherein lies the engine of rural development in Jamaica (Girvan 1993). This thesis took a closer look at the human development aspects of progress and poverty in rural Jamaica, from the perspectives of a sample of rural women, most of whom were participants in REDI. The following chapter explains the methods used in this case study.

Chapter 6. Methodology

6.1 Introduction

As outlined in chapter one, the objectives of this thesis emanated from the goal to provide a broader and more in-depth knowledge of the human dimensions of progress and poverty in rural Jamaica. This exploration required different tools from the standard economic measurements. As part of this exploration, new information was gathered about and from rural women and that task necessitated a feminist lens and some specific methods and techniques. The techniques, approach and ideology that were employed are discussed in this chapter.

This chapter consists of a detailed description and justifications for the selected methodological approach and research design that were best suited to achieve the research objectives. This is a mixed-methods exploratory sequential study. After providing an overview and justifications for the design, the chapter continues with a discussion of the techniques that were applied, which were in-depth interviews, focus group, participant observation and a questionnaire survey. Explanations for the use of each technique are presented in the context of the reliability and validity of the evidence provided. The subsequent section contains an explanation for the sequence and stages of data collection; description of the sample size and the ethics approval procedures; and the application of ethical practices in the fieldwork and analysis. That section follows with a description and justification of the data analysis with a focus on triangulation and presentation procedures and formats are included. The chapter then concludes with a summary.

6.2 Methodological framework

At the foundation of all studies is a set of concepts and a way of seeing reality, or a perspective. These concepts and perspectives are understood as paradigms. Paradigms constitute the human ways of organising the world they live in (Guba and Lincoln 1994; Kuhn 1996). Interestingly, Agamben (2002, 5) advances the idea that a paradigm is literally ‘what shows itself beside.’ In other words, a paradigm is a revealed example of a phenomenon, an example that shows itself beside the phenomenon. He further notes that there are also hidden sides or examples of that phenomenon. How do those hidden sides become exposed? Agamben (2002, 5) states that ‘to show a phenomenon

in its original paradigmatic character means to exhibit it in the medium of its knowability.' Hence, to reveal those hidden sides of a phenomenon one has to expose what is known about that other example from the knowledge of those who experience the phenomenon. This study sought to reveal another perspective of poverty and development from the reality of rural women.

There are several ways to expose knowledge, including, positivist/post-positivist, interpretivist/constructivist, transformative, and pragmatic (Gephart 2004; Mackenzie and Knipe 2006). In the context of research, these paradigms employ, and even share, methodology – that is, the logical approach to discover and represent knowledge (Mackenzie and Knipe 2006). The interpretivist paradigm 'uncovers, describes, and theoretically interprets actual meanings that people use in real settings' (Gephart 2004, 457). Interpretivism or what Tanesini (1999) refers to as continental philosophy, assumes that knowledge is socially constructed, embedded with values and is practical. This school of thought is generally 'concerned with the kind of knowledge we manifest in our everyday dealings with the world. This knowledge is practical mastery; it involves the ability to use, respond to, and produce things' (Tanesini 1999, 12). Creswell and Plano Clark (2011) state that a broader understanding of all phenomena being studied is provided when examined from this worldview.

This research sought new knowledge using the interpretivist/constructivist paradigm because the phenomena of poverty and development are largely absent from the perspective of one of the poorest groups, rural women. Their perception of poverty and development forms the foundation of the concepts in this thesis. This alternative knowledge is important in the Jamaican context mainly because the field of economics, which exemplifies the positivist paradigm, continues to be the dominant representation of poverty and development in Jamaica, in spite of possessing knowledge gaps (Klak 1992; Osei 2001, 2002; Blake and Gibbison 2015).

6.3 Feminist epistemology

Several lenses are used to interpret human experiences within the interpretivist school of thought. One of those lenses is feminism, which is used in this exploratory study to uncover, describe and interpret the experiences of rural women in Jamaica. A feminist philosophical study of knowledge is aligned with the tradition of interpretivism and its

main critiques of the positivist paradigm i.e. that it presumes knowledge to be objective and universal, and that social context is generally devalued (Tanesini 1999). Feminist epistemology, which underpins this study, acknowledges that valid knowledge is also created from the experiences of women and that women are creators and users of knowledge within specific social contexts (Gray et al. 2015)(Tanesini 1999; Campbell and Fonow 2009).

One approach to making the social context central to the creation of knowledge was put forward by Campbell and Fenow (2009) who argue that knowledge is a social and political product as well as a practical tool. However, their main concerns were the limited use of women's knowledge as a practical tool to enhance their well-being, and the inadequacies of dominant information in explaining several aspects of their lived experiences as human beings (Campbell and Fenow 2009). The authors claim that these weaknesses persist mainly because the social conditions of most women, specifically poor women, are often excluded from mainstream knowledge (Campbell and Fenow 2009).

Christ (2005, 286) earlier expressed similar concerns about feminist discourses that 'lock women into one set of possible roles and behaviors while excluding others.' She argues from a metaphysical perspective that feminine divinity which encompasses both body and mind provides more useful descriptions of the conditions of women rather than focusing on their actions. Christ (2005) believes the metaphysical explanation also makes valuable use of knowledge about the spiritual experiences in the daily lives of women.

Hoyt (2007) study of Mormon women provides evidence of the usefulness of the metaphysical explanation of the experiences of women. Hoyt (2007) explains how the spiritual beliefs in female divinity of a sample of Mormon women validate their roles as mothers and wives. She argues that for these women their roles are fixed to their divinity, which includes 'the theological motivations that guide their lives' (Hoyt 2007, 93). She further explains that 'there is a large number of Mormon women who participate in the religion because it offers them a concrete expression of their value, through conceptualisations of the female divine and the divine within them, which are tied to marriage, maternal practices and kinship' (Hoyt 2007, 93). Hoyt's (2007)

central argument suggests that because of the social reality of the sample of Mormon women a feminist discourse that is devoid of metaphysics might not provide an adequate explanation of their reality. The above arguments of Christ (2005) and Hoyt (2007) which support the metaphysical explanation of the lived realities of a group of women support Campbell and Fenow's (2009) promotion for meaningful use of women's knowledge as a practical tool to enhancing their well-being.

Lindsay-Dennis (2015) provides evidence of the negative impact on female development of the partial vision produced by dominant discourses. Lindsay-Dennis (2015) argues that the popular knowledge about African American girls is ineffective in representing their socio-cultural experiences and perspectives. She indicates that dominant discourses often narrowly portray African American girls as 'problems', 'deviations' and 'evidence of maladjustment' when compared with developmental trends associated with broader American society (Lindsay-Dennis 2015, 507).

Lindsay-Dennis (2015) suggests that one way of producing more meaningful knowledge of African American girls is to emphasise their psycho-social conditions within the black feminist and womanist research paradigm. She claims that this knowledge is more productive because it is:

> *Culturally based [and takes] into consideration the contextual and interactive effects of 'herstory', culture, race, class, gender, and other forms of oppression … . [It] situates African American girls' development, attitudes, and behaviors in a cultural context … [and allows] for examination of the Black female psyche and social experiences, providing a means to contextualise Black girlhood* (Lindsay-Dennis 2015, 509).

Lindsay-Dennis (2015) believes paradigms that '[do] not allow investigation of the residual effects of multigenerational trauma [and other] metaphysical experiences' may produce distorted information about the creator of that knowledge.

Campbell and Fenow (2009) along with Lindsay-Dennis' (2015) main claim is that feminist epistemology has the potential to construct and reconstruct the experiences of knowers as knowledge and then validates such knowledge by uncovering its usefulness. One way to create knowledge as a practical tool according to England (1994, 82) is the immersion of knowledge seekers or researchers into the social settings of the knowers or participants, and to give up their power and accept that 'the knowledge of the person being researched is greater than that of the researcher.' Her

views were based on a reflexive approach to fieldwork as she examines sexual identities and geography. England (1994, 82) refers to reflexivity as 'self-critical sympathetic introspection and the self-conscious analytical scrutiny of the self as researcher … It induces self-discovery and can lead to insights and new hypotheses about the research questions.' She argues that reflexivity ethically incorporates the subjectivity of both knower and researcher and is capable of creating 'more inclusive, more flexible, yet philosophically informed methodologies sensitive to the power relations inherent in fieldwork' (England 1994, 87).

Metcalfe and Woodhams (2012) propose merging feminist discourse with other relevant fields of study in order for the researcher to construct appropriate knowledge from the realities of women. These authors support Standford's (2002) argument that such an approach will further advance feminist epistemology by minimising the regurgitation of victimhood among feminist scholars and popularising feminists' discourse as a practical tool to a wider audience. New knowledge constructed from the merging of disciplines is believed to be useful as a tool for policy formulation and can also be helpful in empowering women as creators of knowledge (Metcalfe and Woodham 2012).

The participation of women in the creation of knowledge is an important function in feminist epistemology for both knowledge seekers and the knowers. This is because participation provides them with opportunities to reflect, broaden and uncover more knowledge (Brown, Western and Pascal 2013); England 1994). The act of participation also tends to foster bonding between both seeker and creator in the process of discovering knowledge (Brown et al. 2013; England 1994).

The use of knowledge created through participation is believed to produce a broader understanding of the experiences of women (Gray et al. 2015). Schafersman (1997) posits that that knowledge becomes 'proximate reliable truth' and acts as counter knowledge to previously held ideas (Gray et al. 2015). Feminist epistemology has several 'proximate reliable truths', but the reflexivity stance is one approach that can provide them with 'a skeptical attitude about presumed knowledge that leads to self-questioning, holding tentative conclusions, and being undogmatic' (Schafersman 1997). From another perspective, Bammer (1991) with her viewpoint of feminism as

utopia accepts the other 'truths' about women's lives as given. She notes that one of the accepted other 'truths' held by most feminists is that women are strangers in the world of male-defined time' (Bammer 1991, 151). She then argues that the presence of the 'given', the dominant knowledge, that is the male-defined world, 'does not resolve … how to create something … anything, for that matter – that has not already been interfered with' (Bammer 1991, 119). She posits that within the future of feminism the male/female dichotomy is becoming obsolete and providing space for the creation of new knowledge that has not yet been tainted. One of the ideas upon which her utopianism rests is to identify how to 'learn to fight against oppression without destroying the very humanness that we are fighting to make possible' (Bammer 1991, 152). A perfect world for women and men for that matter might not be possible, but the current wave of partnership between men and women in tackling violence against women and gender inequality and other global human dilemmas (UN Women 2012, 2016), can be considered as getting closer to an optimistic future.

Feminist epistemology accepts that women as a group are not homogeneous; that the plurality of valid knowledge helps to reveal the distinct reality of diverse groups of women (Tanesini 1999; Campbell and Fenow 2009). These were some of the strengths that will make a feminist paradigm useful as an ideology in the creation of knowledge in this thesis, even though there was an inherent threat that it may cause the generalisation of the experiences and knowledge of women (Tanesini 1999; Campbell and Fenow 2009).

The review of literature in the previous chapter reveals that detailed knowledge about the experiences of rural women has not been fully gathered and effectively applied to public policy in Jamaica (Edwards 1980; Simmonds 1987; Mohammed 2000; Vassell 2000; Leslie et al. 2001; Wright 2004; Stewart 2014). Furthermore, there is limited evidence that policy makers immerse themselves into the social settings of rural women to gather knowledge from them to enhance policies and programs (Bureau of Women's Affairs and Gender Advisory Committee 2011; Webster 2006). The following section is a discussion of, and justification for, the techniques and methods that were applied in collecting information about rural women in Jamaica.

6.4 Mixed methods research design

As discussed this thesis was designed as a mixed methods exploratory sequential study that combined both qualitative and quantitative methods at various stages of data collection and analysis (Creswell and Plano Clark 2011).

Mackenzie and Knipe (2006) believe the selection of techniques in uncovering knowledge is determined by the worldview and research questions, while Creswell and Plano Clark (2011) give precedence to the research question as the main determinant. However, both sets of authors indicate that a combination of methods can be employed within various paradigms. This thesis applied mixed methods design. According to Creswell and Plano Clark (2007, 5):

> *Mixed methods research is a research design with philosophical assumptions that guide the direction of the collection and analysis and the mixture of qualitative and quantitative approaches in many phases of the research process … Its central premise is that the use of quantitative and qualitative approaches, in combination, provides a better understanding of research problems than either approach alone.*

Oakley (1999) argues that the goal of selecting research methods is not necessarily to debate the advantages and disadvantages of one over the other but rather to 'consider how best to match methods to research questions, and to find ways of integrating a range of methods in carrying out socially useful inquires' (Oakley 1999, 166). Like Oakley, other authors (Laderchi et al. 2003; Williams 1999) propose that the most suitable research methods involving women, such as in this thesis, are those that elucidate their voices and experiences. The above arguments served as justification for the use of mixed methods in this thesis and they were suitable for answering the research questions and achieving the research objectives which were aimed at capturing a broad view of how rural women understood and experienced poverty and development.

Additionally, the application of mixed methods research was directly influenced by the capability approach (Robeyns 2003a; Alkire 2005, 2007a), which is the central theoretical framework of this thesis. Two philosophical assumptions of the capability approach that indicate the use of mixed methods are the premises that individuals have multiple capabilities and the capabilities they have are valuable in and of themselves. Sen (1985, 187) emphasises this principle of valuing singularity in the presence of multiple priorities by reiterating that well-being information cannot act as 'information

surrogate' for agency, mainly because 'some agency roles, e.g., those related to fulfilling obligations, can quite possibly have a negative impact on the person's well-being.' In other words, well-being and agency have the same ends, that is, valuable freedoms, but they have different means of getting to their shared ends. The value of those means should be accounted for separately rather than being an aggregate of the valuable ends. One way of accounting for the value of each capability, which were sometimes both means and ends, was that specific information on each was collected separately (Robeyns 2003a; Alkire 2005). The application of diverse methods helped to identify and preserve the value of the multiple capabilities of the sample of rural women. Furthermore, Frechtling (1997, 6) have advocated mixed methods as a strategy for strengthening the data when conducting an evaluation:

> *When investigating human behavior and attitudes, it is most fruitful to use a variety of data collection methods … [because] different sources and methods…can build on the strength of each type of data collection and minimize the weaknesses of any single approach. A multimethod approach to evaluation can increase both the validity and reliability of evaluation data.*

6.4.1 Mixing the qualitative and quantitative techniques

In this thesis the qualitative techniques were in-depth interview, focus group discussion and participant observation, while the quantitative technique was a questionnaire survey. Prior to this primary research came the literature review as presented in Chapters 2-4.

In-depth interview. In research, in-depth interview is a technique used to uncover the knowledge of the research participant on a given topic (Frechtling 1997). The aim of the interview is to capture the subjective reality of the participant in as full detail as possible and therefore requires effective probing and listening skills. An interview guide is believed to be advantageous (Frechtling 1997; Creswell and Plano Clark 2011). Irvine (2011) argues that in-depth interview can be conducted either by electronic medium or face-to-face, but the selection of mode is dependent on the purpose of the research as well as the practicality and ethical implications.

Apart from being able to produce extensive information about a phenomenon, the openness of the interview process provides both researcher and participant some levels

of flexibility (Broom 2005). Boyce and Neale (2006) warn that in-depth interview may be time-consuming, prone to bias and often assumes generalization indirectly. Lucas (2014) argues that such claim to knowledge about the entire population can jeopardise the validity of the information provided by the participants, but most importantly, the validity of the study.

In this study an interview guide was used throughout the fieldwork, which was informed by the research questions and literature related to the participants. The interview guide had two sections. Section one was an introduction of the researcher, an overview of the study and explanation of the ethical aspects of the study and interview. Once consent was given, orally or written, for the interview to be conducted and audio-recorded, then the researcher proceeded to section two. Section two consisted of the main themes from the research questions, under two headings – intended and unintended impact of the project, REDI. Under intended impact, participants were asked to provide a description of the subproject, benefits and type of participation, personal needs addressed by the project, the differences in their life that were directly related to their participation in the project, problems encountered and solutions pursued. During discussion about the unintended impact, participants and researcher dialogued about unintended benefits and challenges that resulted from REDI and emotional experience associated with their participation. After using their experience with REDI as a source to reflect on their life and current conditions, the interview moved on to capture a deeper level of understanding about their life experiences as a strategy to minimise generalisation of their experiences (Lucas 2014).

The in-depth interview then progressed as a narrative inquiry at a relational level (Saleh, Menon and Clandinin 2014) with the researcher being the knowledge seeker and the participant as the creator of knowledge (England 1994; Brown et al. 2013). Probing was essential at this stage of the interview and was used as a tool to verify the 'proximate reliable truths' of the participant as the creator of knowledge (Schafersman 1997) as well as promote critical reflection for both the creator of knowledge and the knowledge seeker (England 1994; Breen 2006). The participant as the creator of knowledge shared her experiences and perceptions of poverty, the current state of her life in relation to her understanding of poverty. She described well-being and her current state of well-being; as well as explaining her priorities and the problems she

has encountered in her life. The interview ended with her reflection on her emotional experience of obstacles and challenges.

The in-depth interview with the project team members had a different format as it focused more on REDI and the participants and less on personal information about the team members. The interview guide had the same introductory section but section two was different. Team members were asked to first describe the context of development of rural women, specifically, the role and relationship between social, psychological, physical and economic factors in their development. Secondly, they provided a description of multidimensional poverty in rural Jamaica; then the impact of REDI on that poverty of rural women based on their interaction with the women. The final section provided them with an opportunity to critically reflect on the formulation of REDI and its role in rural development, as well as their overall rating of the initiative at its then stage of implementation.

Focus group. Focus group as a research technique can be viewed as 'a controlled group discussion, on the basis that the group interaction generated through discussion is of prior importance to this methodology' Smithson (2000, 104). This technique of gathering qualitative data in a collective setting has the potential to generate new ideas (Breen 2006) about a phenomenon because of its strong emphasis on deliberation about a common matter of interest to both researcher and participants (Wilkinson 1998)(Parker and Tritter 2006). The focus on a specific topic or issue is generally to ascertain a range of understandings and insights into the perceptions of the participants (Parker and Tritter 2006). Partly because of this feature of participatory reflection of the focus group, Schischka and co-authors (2008) like Breen (2006) argue that the focus group has the potential to build skills of critical evaluation among participants. Chambers (2014) reiterates that with this skill of self-critical reflection, people, especially the poor, are better equipped to change their condition of poverty.

However, Smithson (2000) asserts that focus group is more about the interactions of group members and cautions that special attention be given to the role played by dominant individuals within the group. In other words, the outcome of the focus group may actually be the values of the dominant members and not necessarily that of the group and hence would not be an outcome based on consensus. The author notes that

in cases where group homogeneity and the function of a moderator is unable to secure meaningful consensus, he then recommends that 'a group process of collaboratively constructing a joint perspective, or argument, which emerges very much as a collective procedure which leads to consensus, rather than as any individual's view' (Smithson 2006).

In this research, focus group was a data gathering technique which was responsive to the fact that participants in their natural setting were often members of groups. Therefore, the focus group was a natural space for the participants to share most of their life experiences, such as social values, fears, economic opportunities and challenges, satisfaction and dissatisfaction with social programs and the government. Another benefit of using focus group was that:

> *It allows participants to identify for themselves the choices and opportunities they have learned or discovered through their participation; that is, it assists participants to recognise the active expansion of their own capability sets … provide information on the participants' life choices that they themselves value and have reason to value …* [including] *a wide range of non-monetary gains* (Schischka et al. 2008, 243).

Yet there were some life experiences that were shared in the face-to-face interview, and those mainly relate to money, asset accumulation, intimate relationships, and interpersonal conflicts.

Participant observation. Being able to 'stand back and observe that of which you are a part' (Bogdewic 1992) was the main technique used in understanding the life experiences of the sample of rural women. Given the research focus of understanding 'how the activities and interactions… give meaning to certain behaviors [and] beliefs' (Bogdewic 1992, 46), participant observation was essential. Through participant observation the researcher was able to interact with participants in their natural settings and actively participate in aspects of their daily life (Singleton and Straits, 2010).

Without the use of participant observation most of the life experiences of the participants would appear illogical, some occurrences would be meaningless to the researcher, the knowledge seeker. For example, after phase-one of data collection, while summarising the emerging themes, it was observed that there was an absence of desire for self-development for most of the women. Their desires related to their

children's needs, those of the community and persons 'worse-off' than themselves. Following portrayal of the poor in most literature, the researcher initially assumed that the sample of rural women had low self-esteem. However, after consultation with research supervisors, deeper engagement in the life and communities of the participants, reflections in phase-two, the researcher gained a broader understanding of the desires of the participants. The creators of knowledge, the participants, generally spoke about themselves as individuals who were made up of different parts, as if they had multiple selves – they were 'me' as the individual, 'us' as the children and those in the household, and 'we' in relation to the community. Their conversations mainly involve 'us' and 'we'.

The inclusion of participant observation, which is mainly the collection of data in the natural setting of the participants (Frechtling 1997), was most suitable and effective in creating new knowledge about their lived experiences. This new knowledge was critical because of the paucity of data on rural women in Jamaica. Furthermore, it reveals that dominant knowledge is simply one paradigm (Agemben 2002) and the search for meaning in human behaviour requires the use of other paradigms. The strong influence of dominant knowledge about these rural women was evident through the initial reaction of the researcher. The feminist interpretive paradigm which underpins this study served as a guide in the search for the valuable meanings that rural women ascribe to their realities (Gephart 2004; Christ 2005).

However, Watts (2011) cautioned that external reviewers are limited in their ability to verify the validity of data collected through participant observation mainly because all they have to rely on is the claim of the researcher about her or his presence in that setting. Ethical issues were also raised by Watts (2011) in relation to the vulnerability of participants due to the skewed power relation between them and the researcher. Furthermore, there are practical implications of applying participant observation, in that informed consent is incomplete because the researcher basically has free reign to collect data on any and everything in the life of the participants (Watts 2011). Confidentiality and trust therefore become critical in the use of participant observation. While the relational aspect between the researcher and participant is inevitable when using this method, boundary setting, applying ethical interpersonal skills and

employing reflexivity throughout the data collection period may help to minimise the ethical and practical threats (Watts 2011; Cuomo and Massaro 2016).

This method of data collection provided an opportunity to recognise another layer of knowledge from the lived experiences of the sample of rural women. This was a layer that explained meanings and measures of value as well as provided the foundation for 'appropriate judgments' (Singleton and Straits 2010, :365) about the lived realities of the participants. Additionally, participant observation allowed the researcher to observe 'the sequence and connectedness of events that contribute to the meaning of [their poverty and development]' (Bogdewic 1992, 47). However, given the informal and intrusive nature of participant observation (Bogdewic 1992), which could compromise ethical principles of the research, consent was requested and confidentiality was assured throughout the period of fieldwork and for five years after the fieldwork (Commonwealth of Australia 2017). The use of multiple methods of data collection, the questioning of personal assumptions, and acceptance of the knowledge held by participants as valid, were strategies employed with the aim of minimising data bias and error as well as enhancing validity and reliability of the research.

Questionnaire survey. This is a method of collecting data through the use of pre-selected closed or open-ended questions from a specified population (Visser, Jon A. Krosnick and Paul J. Lavrakas 2014). Surveys can reduce the time for data collection as well as provide vital information in the identification of patterns for a particular segment or the entire set of a population (Scott 2010). Some of the nuances of using this instrument relate to the method of administration (Escobal and Benites 2013), the level of literacy of the population being surveyed (Lee, Bartolomei and Pittaway 2016) and the fact that the structure of questions can impact the response rate (Denscombe 2009). Yet survey designers should be cognizant of the potential limitations associated with this method of data collection. Waller (2013) found that survey administrators devise strategies to falsify data collected in the field, while Bennett and Kane (2014) reveal how insufficient pre-testing and limited knowledge of the target audience, associated with varied interpretations of survey concepts compromised the accuracy, validity and relevance of data collected through a national survey.

In phase three, information from phase one and two were verified by the participants, and used to construct the questionnaire survey, entitled *Capability Survey of Rural Women in Jamaica 2014*. The key section of the survey was the capability sets. Additionally, the survey captured demographic data from the participants, specifically, age range, marital status, household status, family size, relationship to head of household, composition of household with female head, productive status, reproductive status, spiritual affiliation, source of knowledge, and race. The survey included a component that allowed the participants to rank both the functionings within the capability sets and the capability sets against each other, as a feature of the theoretical perspective. The survey was administered face-to-face in the natural environment of the women. This was done as a continuation of the participant observation and also because of the low levels of literacy amongst the sample of rural women.

6.4.2 Description of the sample size

Recruitment of participants: The sample of participants was purposively selected, through the snowball and key informant methods because these techniques are generally effective in collecting context specific information, which is often not available within the general population (Tongco 2007) (Leech 2011).

Ethics and purposive sampling: The first step in identifying the participants was to ascertain approval for using REDI as a case study. Initial consultation was made with the project manager in July 2013, one year before conducting the fieldwork, and communication was continuous throughout the year. Ethics approval for the research was granted as a low-risk study by Curtin University during January 2014 because the proposal complied with Australia's National Statement on Ethical Conduct in Human Research. Approval to use REDI as a case study was granted by the executive director of the Jamaica Social Investment Fund (JSIF) in May 2014, approximately two months before the fieldwork. After the approvals were granted, the project manager provided the names of the subprojects and information for the main contact persons. After initial contact with those key informants, they then provided contact information for the project participants, who further identified additional individuals throughout the fieldwork, based on a snowball effect (Waters 2015). Although it was not effective in

yielding the required number of participants it was valuable in building trust and accessing appropriate participants (Waters 2015).

All participants in the control group were identified by project participants. Some of the initial contacts were made with the key project participants, during which additional contact information was gathered from available project participants. Recruitment of research participants was done during initial contact, while the majority were recruited after several contacts, which included telephone and face-to-face. Participants were recruited because they identified themselves as living and working in rural communities. Members of the project participants were actively involved in REDI for at least a year before the start of fieldwork in July 2014, while the members of the control group had not participated in REDI but resided in the same community. All initial contacts with key informants were done via telephone and followed by face-to-face contact in their rural communities. All information was provided in oral and written forms and consent to participate was voluntary.

Description of participants: A sample of 93 participants consented to contribute to this three phase research study. The sample consisted of 43 REDI project participants (38 women and five men), 46 non-participants (females), three REDI staff members and one World Bank representative. Overall, the 89 research participants, apart from the REDI staff members and the World Bank representative, were residents of six rural communities in Jamaica – Bath, Logwood, Maggotty, Mango Valley, Prospect and Treasure Beach.

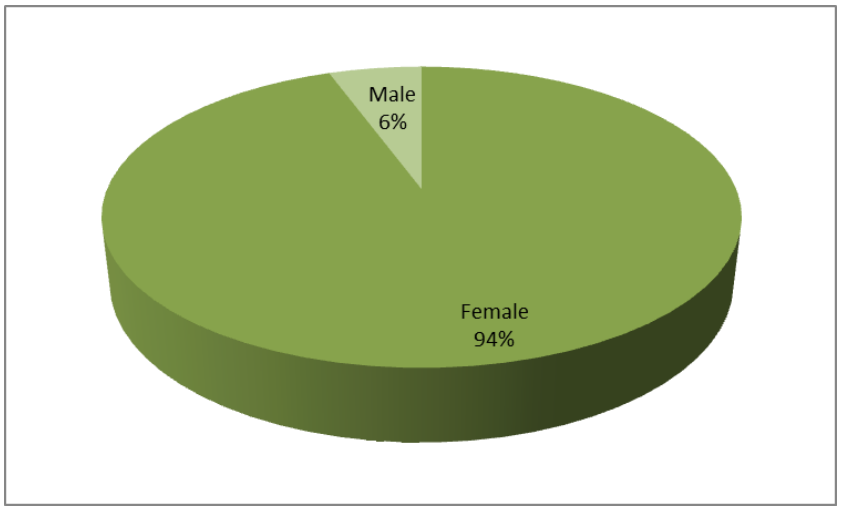


Figure 6.1 Gender distribution of study participants

The gender composition of the community participants was predominantly women, as indicated in Figure 6.1 Gender distribution of study participants, with the 84 women accounting for 94 per cent of the total community participants.

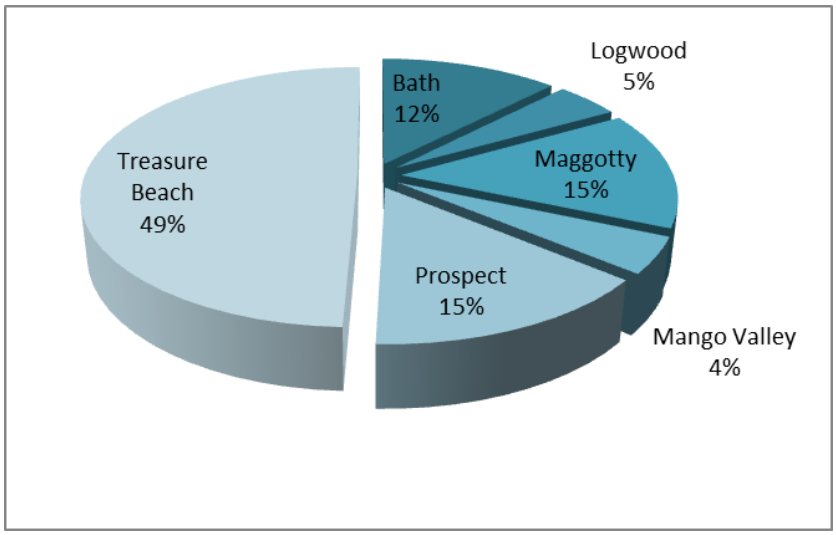


Figure 6.2 Distribution of participants across communities

In terms of the distribution of participants across communities, Figure 6.2 Distribution of participants across communities illustrates that almost half (49 per cent) of the participants lived in the community of Treasure Beach in the parish of St. Elizabeth. The communities of Prospect in Manchester and Maggotty in St. Elizabeth equally accounted for the second highest number (15 per cent) of participants. The lowest percentage of participants resided in the communities of Logwood in the parish of St. Thomas and Mango Valley in St. Mary.

Table 6.1 Participants by community and research activity

Community	Interview	Survey	Grand Total
Bath	6	7	**7** (women)
Logwood	0	4	**4** (women)
Maggoty	5	11	**13** (11 women; 2 men)
Mango Valley	4	0	**4** (women)
Prospect	8	8	**12** (9 women; 3 men)
Treasure Beach	20	41	**44** (women)
Total	**43**	**71**	**89**

The pilot survey was conducted with the four participants in Logwood and one participant in Treasure Beach. Logwood was not a fieldwork site, hence after the pilot survey no other activity was conducted in that community. At the time of the survey administration the Mango Valley group had not yet received approval for their subproject proposal; as a result the women in that community participated only in the interview as indicated in Table 6.1, which contributed to the low representation of that community in the research activities. It must be noted that not all the participants who took part in the interview also participated in the survey, therefore the grand totals are not aggregates of participants in all research activities but rather total number of community participants.

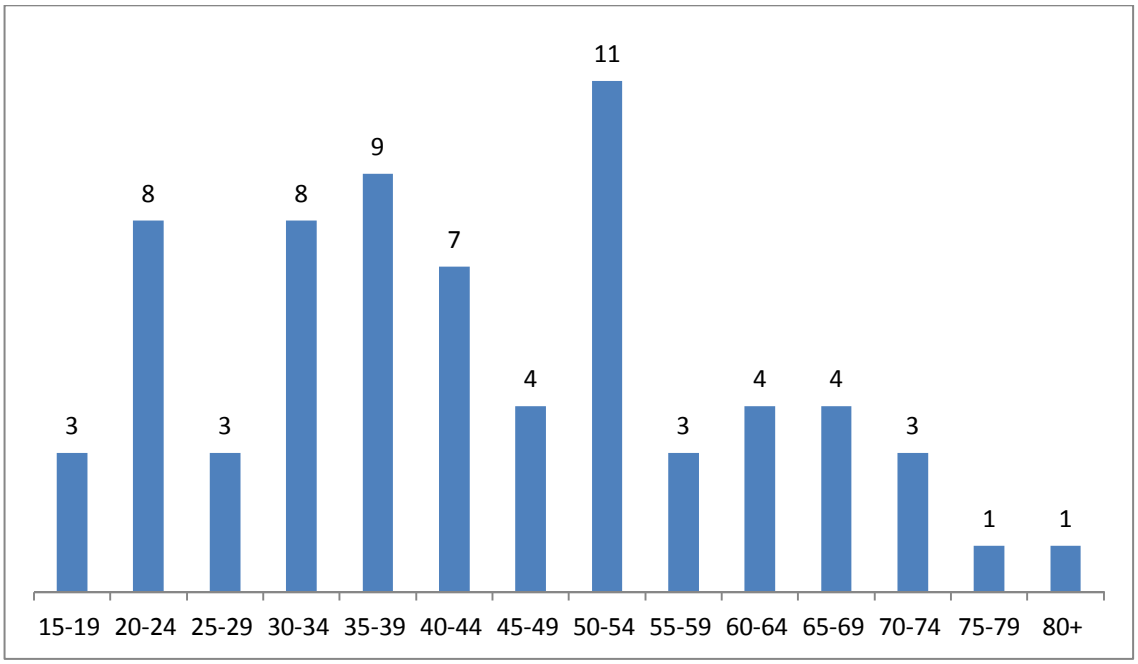


Figure 6.3 Age range of surveyed female participants

Figure 6.3 illustrates that the age of the participants ranged between 15 years old and 88 years old, with the mean and median age range of 40-44 years old. Of the 69 surveyed participants, the age group cohort below 30 accounted for 20 per cent. It must be noted that while the inclusion of the age group 15-19 suggests the participation of minors in this study, no children or minors were involved, in keeping with the approved ethics for this study. The age group was included to capture young adults of the age of 18 years old as stipulated by the Jamaican law (Ministry of Justice 1979) as well as for consistency with the labour force age groups (Statistical Institute of Jamaica 2014). The majority (67 per cent) of them were clustered in the age groups between ages 30 and 64. Women of retirement age and older accounted for 13 per cent of the surveyed sample.

6.4.3 Sequential mixing of the methods

The qualitative methods, namely, literature review, in-depth interview, focus group and participant observation, which were conducted in phases one and two provided the themes and meanings used in the development of the *Capability Survey of Rural Women in Jamaica 2014* in phase three, as illustrated in Figure 6.4: Sequential mixing of methods during fieldwork and thesis preparation. The inferences made in the findings, discussions and conclusion were informed by both the qualitative and quantitative methods.

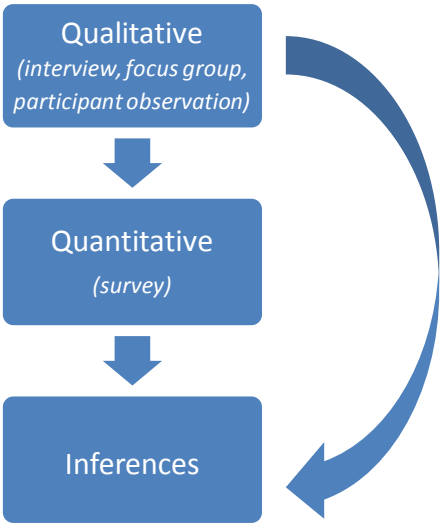


Figure 6.4: Sequential mixing of methods during fieldwork and thesis preparation

6.4.4 Three-phase data collection process: Steps and procedures

The research included a three-phase fieldwork undertaken over six months (August 2014 to January 2015). In phase one, 18 semi-structured interviews, nine focus group discussions and participant observation were conducted. Based on the availability of the participants, 13 interviews were administered as individual face-to-face, four via telephone and one via tele-conference. All focus group were semi-structured and in-person as highlighted in Table 6.2. Interviews and focus group discussions lasted between 60 to 180 minutes at various locations, as consented by the participants – on the beach and in restaurants as the researcher and participants ate together, in offices while participants sewed and in-between responding to customers, at churches, on farms, tourist resorts, at their homes while they were cooking, caring for children, washing, cleaning, relaxing, and also while some were doing home slaughtering of

chickens. Participant observation was continuous throughout the fieldwork and included residency in Treasure Beach for 32 days, during which the researcher engaged with the participants in several of their personal and community activities. Additionally, with the participants, the researcher stayed two days and a night in Maggotty, attended a 'chicken-back' street party in Bath, fish market by the sea in Prospect, and shopped at the Ocho Rios Market with some of the Mango Valley participants.

Table 6.2 Three-Phased Fieldwork and methods

Phase	Methodology	Technique	Data collected
Phase 1	In-depth interview	Interview guide with semi-structure question	Impact of REDI, definitions of poverty and well-being
	Focus group discussions	Interview guide with semi-structure question	Impact of REDI, definitions of poverty and well-being
	Participant observation	Active observation in personal and community life	Fieldwork notes for triangulation
Phase 2	Individual interview	Telephone and face-to-face discussion about draft list of functioning and capability	Thematic analysis, and follow-up interviews to verification of meanings for the 13 selected indicators of the 4 key dimensions
	Participant observation	Active observation in personal and community life	Fieldwork notes for triangulation
Phase 3	Develop survey instrument	Combine literature review and verified list of functioning and capability	
	Administer survey instrument	Administered via face-to-face and telephone	Functionings, capability sets and ranking of capabilities
	Participant observation	Active observation in personal and community life	Fieldwork notes for triangulation

All interviews, focus group discussions and participant observation activities were scheduled and conducted at the discretion of the participants. Oral communication with the rural participants was conducted in Patois, while communication was in English for the REDI staff members and World Bank representative.

The interviews and focus group discussions were audio-taped and then transcribed, except one interview which the participant requested not be recorded. These methods

were employed to explore the three key categories of the research – their definitions of poverty, well-being and the impact of the REDI project. Table 6.2 indicates that phase two of the fieldwork consisted of thematic analysis and follow-up interviews. Thematic analysis and content analysis were conducted to conceptualise and identify the indicators for the four pre-selected themes of material, physical, social and psychological poverty and well-being. These themes represent the dimensions of poverty and sets of capability for the sample of rural women. The follow-up interviews conducted with a sample of the rural women were mainly to verify the conceptualisation and relevance of the capability and functionings. After consultation with the sample of rural women, the literature and other academics, emergent from the data were four sets of capability and 13 functionings, as listed in Table 6.3. The list of functionings and capabilities in Table 6.3 was viewed as valuable to the sample of rural women in relative ranking.

Table 6.3: Dimensions and indicators of valuable functionings and capabilities for rural women in Jamaica

Dimension	Indicator
Economic	- Being able to participate in productive activities - Having ownership of productive assets - Being able to invest in child/children
Social	- Being able to participate in community activities - Having a relationship with children - Being known/having affiliation - Having a loving and faithful partner -
Psychological	- Being independent - Being cautious - Being motivated -
Physical	- Having bodily health - Being able to have children - Having skills and practical knowledge

An emphasis on meaning was an essential approach because the focus of the research was not about how poor the informants were but rather what poverty meant to them. Interview and focus group discussions were suitable for gathering and probing their explanations and meanings of poverty, various events and life experiences.

Focus group discussions assisted in identifying consensus and divergence in explanations and meanings. Through participant observation the researcher had opportunities to witness illustrations of meanings and significance of some experiences and objects within their particular social context.

In phase three, using the verified functionings and capability sets, a capability survey was constructed. The key section of the survey was the capability sets. Additionally, the survey captured demographic data – age range, marital status, household status, family size, relationship to head of household, composition of household with female head, productive status, reproductive status, spiritual affiliation, source of knowledge, and race. The survey included a component that allowed the informants to rank both the functionings and capabilities within the capability sets and the capability sets against each other. The survey was administered face-to-face and was undertaken as both a continuation of the participant observation and partly because of the low levels of literacy among the women. However, two surveys were administered via telephone. Each survey took approximately two hours to complete.

Researcher as instrument: Subjective evaluation is an essential feature of the theoretical perspectives, the capability approach and feminism, as emphasised in earlier chapters. The researcher as an instrument in the data collection and analysis contributed to such subjectivity. Selection of rural women as the unit of analysis was guided by professional and personal preference. The researcher was a public servant at the Bureau of Gender Affairs, an agency in the Government of Jamaica, and was required to use a gendered lens in executing her job. Additionally, from an objective perspective, the 2010 Jamaica Survey of Living Conditions (JSLC) revealed that rural women were highly represented in the poorest quintiles (STATIN and PIOJ 2012).

During data collection, to minimise subjectivity, subprojects were selected by the REDI project manager, based on the criteria that they must be active for more than a year before data collection and include female participants. Communication with the research participants was done in the Jamaican Creole, Patois. Patois is a common language among most Jamaicans, especially rural residents. It is a tonal language, ranging from rising tone, mid-level tone and falling tone and while the different tones communicate differences in the meaning of words, changes in the tone also express emotions (Foster 2014). Patois was an important tool that was used to allow the

informants to readily share information (Oriola and Haggerty 2012). Furthermore, communication between the researcher and participants in the same language was a strategy employed to reduce the outsider effects and enhance confidence that they were being understood (Oriola and Haggerty 2012; Al-Makhamreh and Lewando-Hundt 2008).

Patois was also used to build trust between the researcher and participants. To enhance trust the researcher had prolonged engagement with the participants and communities throughout the six months of fieldwork. Familiarity with Patois appeared to have provided a safe space for oral as well as emotional expressions, which might generally not have been accessible (Al-Makhamreh and Lewando-Hundt 2008). This assumption was based on observation of both women and men crying and laughing about various experiences, while responding to the research questions. Anger, happiness, sadness and despondence were some of the emotions expressed during interviews, focus group discussions and participant observation.

In spite of the benefits of being an insider in making more visible the plight of rural women in Jamaica, such a position could also bias the data analysis and findings. There were instances during the fieldwork where the researcher took on the role of a 'sympathetic confidante' (Cuomo and Massaro 2016) to some informants, due to multiple interactions, continuous exposure to their deprivations and listening to numerous cases of abusive and violent relationships. Boundary-making strategies (Cuomo and Massaro 2016) employed during fieldwork to balance the influence of the insider-outsider effects were to avoid long-term residency in any of the rural communities and restrict probing questions to matters directly related to the research. Additional efforts to minimise biases were the pre-selection of themes from the literature review and careful guidance provided by the research supervisors regarding the themes, categories and rationale for the findings (Al-Natour 2011).

In phase three the responses from phases one and two were summarised into four categories: economic, physical, social, and psychological dimensions. Based on the value system of the informants, each dimension was ascribed indicators accordingly, with the top three or four selected based on frequency of response (see Table 6.1). This data was developed into the survey, which captured data on demography, as well as valuable economic, physical, social and psychological aspects of the life of the sample

of rural women. Additionally, the survey included a component which allowed the informants to rank the four aspects of their life, in an effort to capture any transitive properties in their ranking. This is a condition of the evaluative space, according to Sen (1993).

6.5 Unit of analysis

The unit of analysis was female participants of the REDI project. Rural women were selected as the unit of analysis because they are described as the most deprived group in Jamaica (PIOJ 2012). Rural women are those who work and live in communities that are between five miles and 25 miles outside towns and city centres, (Byun et al. 2012) and usually use land as their primary means of production and livelihood (IFAD 2010). The sample consisted of rural women from six communities, as was previously identified in chapter five.

However, men participated in this study as far as they were actual agents in the social context of the female participants (Bammer 1991). The men contributed to the structure of their social realities and validated the women as creators of knowledge. Analysis of the role of men in the social context of women was outside the scope of this study. The usual approach to understanding poverty in Jamaica is at the household level (Planning Institute of Jamaica and Statistical Institute of Jamaica 2009; Benfield 2010). However, this study investigated poverty at the individual level because it is believed to provide a more in-depth explanation of the impact of poverty alleviation strategies rather than at the household level (Deosaran (2000). A study at the household level might not be able to provide suitable subjective details from which to draw inference for poverty alleviation and policy-making at the macro level (Arrow 1994).

A purposive sampling technique was used to select a sample of informants based on the following characteristics: adults (18 years of age and above); mostly from the poorer parishes; participants of a particular scheme for the relief of poverty, REDI project, for at least one year before the start of fieldwork; and non-participants of the REDI project. While proportionality was not a major concern in selecting the sample size, special efforts were made to select women from various socio-economic backgrounds. This was done to reduce response bias and to reflect the diverse livelihood strategies and quality of life of rural women in the general population. This

sample included female-heads of households, women who co-head with male partners, wives, widows, women without children, women with children, women who engage in economic activities at home and those who work outside the home, grandmothers, students, pensioners, those unable to work and those seeking work.

6.6 Data analysis and presentation

The key strategies employed in analysing the data were thematic analysis, content analysis, pattern matching and triangulation. The main variables of interest were poverty and development. The findings are presented in written text and aided by tables, charts, graphs and pictures. Diverse methods of data analysis and presentation were employed to illuminate the various aspects of the life experiences of rural women and the impact of REDI on the material, social, psychological and physical dimensions of their quality of life.

Both inductive and deductive approaches were applied in the analysis of the various sources of data collected. The use of the capability approach as the theoretical premise was informed by deductive reasoning, which espouses the application of an established method of knowledge creation in collecting and presenting data (Khaikleng, Wongwanich and Sujiva 2014; Lee and Lo 2014). Employing inductive reasoning follows a fundamental principle of the capability approach, that is, the application of personal judgement (of the research participants) to uncover definitions and characteristics of poverty and valuable well-being (Sen 1999; Austin 2016).

Thematic and content analysis: Braun and Clarke (2006, 6) refer to thematic analysis as 'a method for identifying, analysing, and reporting patterns (themes) within data.' The authors note that methodologically, thematic analysis is done by minimally organising and describing the data set in rich detail. Downe-Wamboldt (1992, 314) describes content analysis as 'a research method that provides a systematic and objective means to make valid inferences from verbal, visual, or written data in order to describe and quantify specific phenomena.' Methodologically, the initial step of data analysis was the use of content analysis in making inferences of the verbal and written data, then those inferences were organised under themes, thereby preparing for the thematic analysis of the qualitative data (Ryan 2003; Braun and Clarke 2006) in order to gather the definitions of poverty and development. Key topics from the literature reviewed were used to represent the primary themes – material, social,

psychological and physical – of the main variables of poverty and development. At the start of the fieldwork a summary sheet was drafted with the primary themes, as the outline of the thematic analysis. Content analysis of the notes and audio recordings was conducted daily and weekly, which was used to develop the preliminary frame of the themes while in the fieldwork. The themes for the variable development were fully developed in the field, while those for poverty were further developed over a two-year period after the fieldwork.

After fieldwork, detailed content analysis continued using coding, assisted by NVivo Version 10 (computer qualitative analysis software) to transcribe in-depth interviews, focus group discussions, notes from participant observation and fieldwork notes. In NVivo, a parent or hierarchical framework using nodes was then created for each dimension of poverty and development. A node is a virtual container in NVivo that is used to store and organise data from multiple sources that relate to a specific variable (Bazeley 2013). Additionally, node functions as both an end point for closed concepts and a starting point from which to create a chain of sub-concepts or child nodes (Wiltshier 2011; Bazeley 2013).

Sub-themes (nodes and sub- or child nodes) for the indicators of poverty were created. This reflected a hierarchy of the data, moving from general (dimensions) to specific (indicators) perspectives on poverty. Once the nodes were created the thematic analysis continued in NVivo. This process began with a selection of text from source documents (interview and focus group transcripts, participant observation notes), then the content of these were analysed and coded at emergent thematic areas or child nodes. These sections were not excerpts cut from the source document but rather text references that could lead back to the source document, which remains unchanged to maintain the quality and validity of the data (Bazeley and Jackson 2013). Creation of child nodes was an ongoing task throughout the thematic analysis as additional sub-themes were identified in the data. The development of a hierarchical coding framework for each indicator of poverty provided a collection of multiple perspectives on the four dimensions of poverty, which were then further analysed for patterns and meanings, which represented pattern-matching.

As a first step in identifying the relationships between indicators, NVivo software was used to support the undertaking of detailed content analysis of the text references coded to 29 indicators. It must be reiterated that all coding and analysis was done by the researcher and not the software, since NVivo was used only as a data storage and management program and not an analytical tool. Linguistic connectors in the narratives of the participants such as, *because*, *since*, *as a result*, *if*, *and*, *then*, *instead of*, *rather than*, *before*, *after*, and *next*, were the main criteria used in identifying these relationships (Ryan and Bernard 2003). Self-reported relationships between deprivations might not reflect objective evidence of causal association in some contexts. However, the respect accorded to personal evaluation within the capability paradigm validated these relationships as a relevant starting point to understanding the nature of poverty that was experienced by the sample of participants (Patel and Kleinman 2003).

A relationship was established when a linguistic connector was found in a reference shared by two indicators. That reference was then added to a relationship node, which consisted of the two related indicators. An NVivo matrix and a model were the two main formats used to explore relationships; however the following section will focus on the process for the development of models as associated illustrations appear consistently in the analysis chapter.

Several steps were followed in order to create the NVivo model of emergent relationships thus providing a visual representation of the concepts and connections in the data set. Following extensive coding and the establishment of relationships between concepts and identification of a notional causal connector, e.g. ‘leads to’, ‘contributes’, ‘ associates’, these aspects were added to a map or the illustrative component of NVivo software. For example, the highlighted areas in Figure 6.5 Highlights of creating an NVivo model of relationships show that depression was the indicator being explored and two relationships associated with depression were selected.

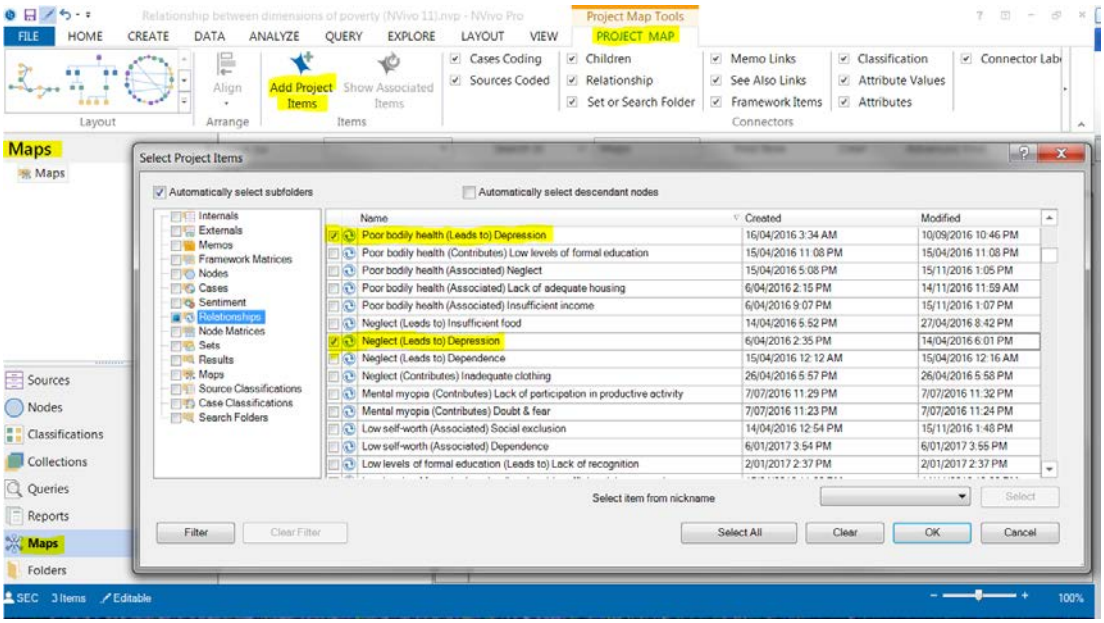


Figure 6.5 Highlights of creating an NVivo model of relationships

While this is a process largely developed as a function of the software, modifications can be carried out by changing the connector, shape and colour as desire, to add emphasis. The completed model, as shown in Figure 6.6 Modified model of relationships & direction between depression and other indicators of poverty, illustrates the relationship between depression and other indicators of poverty.

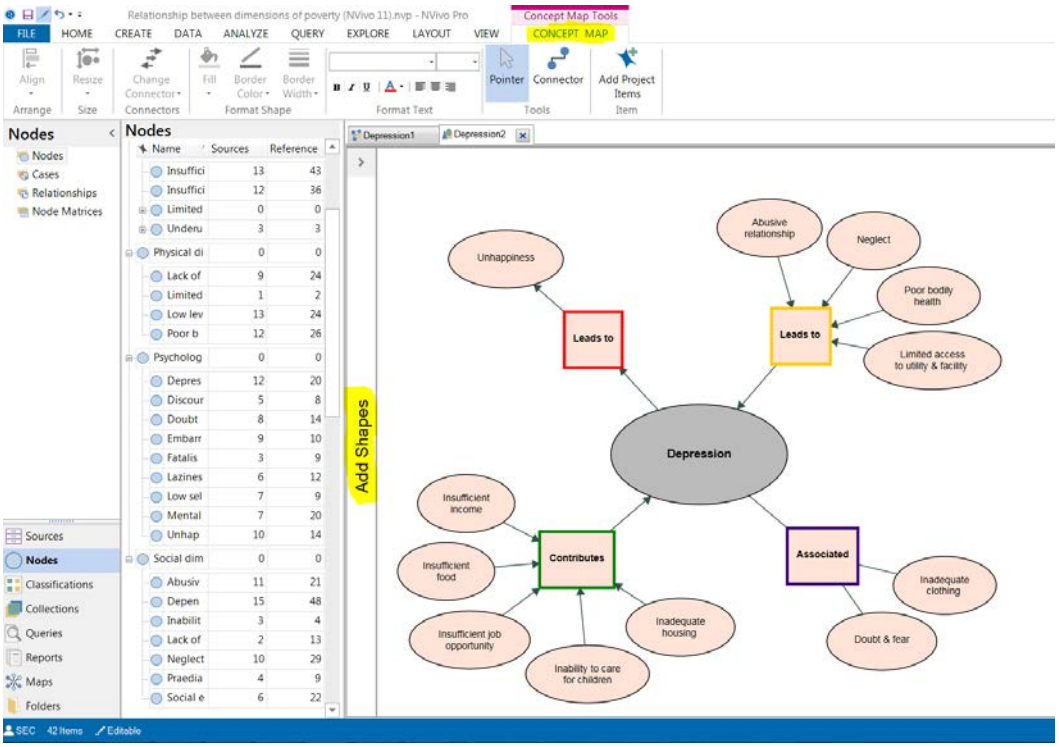


Figure 6.6 Modified model of relationships & direction between depression and other indicators of poverty

6.6.1 Triangulation

Apart from the practicality and theoretical influences that guided the use of multiple methods in this study, all the above-mentioned methods and procedures were applied also in an effort to enhance the credibility of the arguments and conclusions set forth in the findings and discussion chapters. The approach used to mix and merge the diverse techniques is referred to as triangulation. Triangulation as defined by Denzin (1978, 291) is 'the combination of methodologies in the study of the same phenomenon.' Kern (2016, 1) expounds Denzin's (1978) definition and refers to triangulation as 'a strategy in qualitative and quantitative research to increase the validity of inference by combining "varieties of data, investigators, theories, as well as methodologies" in the study of the same phenomena.' By adding the purpose Kern (2016) gives focus to the function of triangulation and points out how to conduct triangulation as a function of research. Denzin (1989) outlines four ways of using triangulation as a tool; the use of multiple data sources (data-source triangulation); the use of several investigators (investigator triangulation); the employment of two or more perspectives to interpret and analyse the data (theory triangulation); and the use of multiple methods of data collection (methodology triangulation). Thurmond (2001, 253) notes that the act of triangulating is to 'use two or more aspects of research to strengthen the design to increase the ability to interpret the findings.' Thurmond (2001, 254), like Denzin (1978, 1989) describes the same four types of triangulation but adds another, which is data-analysis triangulation; and she refers to data-analysis triangulation as 'the combination of two or more methods of analysing data.' This study employed data-source, methodology and data-analysis triangulation with the aim of providing a broader understanding of poverty and development while enhancing the validity and reliability of the findings (Thurmond 2001; Hesse-Biber 2012; Kern 2016). Kern (2016) notes that data-source triangulation can be done as cross-case analysis with periods, location or individual being the case, while methodological triangulation can be within-method and between-method strategies, as well as simultaneous or sequential (Morse 2010). In this study data-source triangulation is represented by mixing data from text, oral, visual and survey sources. Methodological triangulation is represented by the sequential merging of data collected by interview,

focus group and participant observations to inform data collected by survey, as described in the previous section of this chapter.

In conducting the data-analysis triangulation, this study employed location and individual as cross-case analysis for data triangulation and between-method for the methodological triangulation, while assessing both 'convergence and divergence of different sources' (Kern 2016, 2). Some authors are of the view that the presence of divergence indicates invalid measurement (Moran-Ellis et al. 2006). However, Kern (2016) points out that employing triangulation with easily reproducible guidelines and on-going debates could help to mitigate the threat of invalid measurement. In the context of measurement, which is referred to as 'the process of making empirical observations in relation to a theoretical concept' (Collier et al. 2004, 295), Leuffen, Shikano, and Walter (2013) discuss triangulation as data aggregation. They argue that data aggregation can enhance the repeatability and credibility of a research study if the process is explicit. These authors posit five aggregation strategies and explain how they could improve measurement in qualitative studies. The aggregation strategies are random selection, arithmetic mean, majority strategy, weighted average and winner takes all, although through simulation procedures Leuffen et al. (2013) suggest weighted average and winner takes all to be most effective in enhancing reliability and validity. Nevertheless, the authors strongly recommend that the selection of an aggregation strategy be based on the researcher's understanding of the data sources, 'the number of sources, their respective trustworthiness, and their level of independence' (Leuffen et al. 2013, 49). Based on the researcher's knowledge of the data sources, weighted average aggregation strategy was selected.

Leuffen and co-authors (2013) describe how data collected by multiple sources is aggregated using the weighted average strategy. In this scenario, the focus is on the data sources and they note that when the researcher has imperfect knowledge about the quality of the data sources, the researcher can evaluate the quality of the sources either *ex ante* or *ex post* (Leuffen et al. 2013). In this study the *ex post* ranking was employed because it was only after data collection that the researcher was able to effectively evaluate the quality of the varied sources (Leuffen et al. 2013; Kern 2016).

6.6.2 Data source evaluation

Evaluation of data source using the weighted average strategy can be based on information quality, in which quality could be based on the engagement, memory and consistency of explanation during data collection (Leuffen et al. 2013). The authors further explain that in evaluating the data source *ex post*, the researcher can rank the varied sources based on the information quality, but:

> *When different sources or data types are ranked according to their informational quality, a weighted aggregation strategy can be used. This means that the researcher attaches a greater weight to those sources judged to be of a higher quality* (Leuffen et al. 2013, 44).

Leuffen and co-authors (2013) recommend that the application of the weighted average strategy of data aggregation can be supported by a weighted average formula, which the authors developed, as shown in Figure 6.7 Approach to measuring weighted average for varied sources. However, Kern (2016) conducted weighted average with qualitative scales.

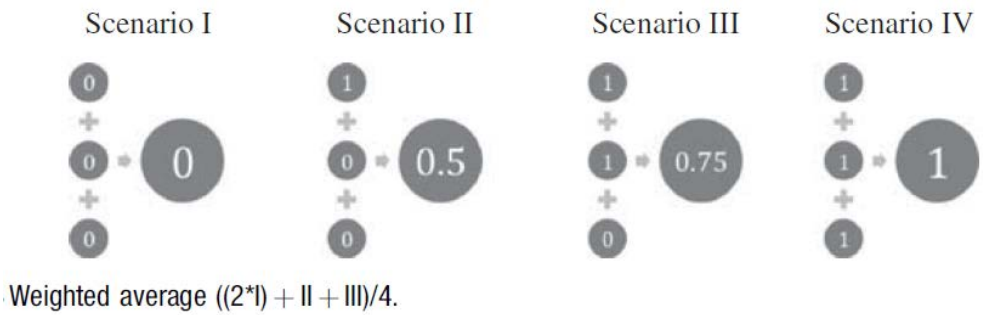


Figure 6.7 Approach to measuring weighted average for varied sources
Source: Figure adapted from Leuffen et al. (2013, 44)

This study employs both and additionally, to enhance the reliability and validity of the outcomes of this study, convergence and divergence of sources in relation to the key variables of poverty and development were included as part of the assessment of data sources (Kern 2016).

This study classified the sources that produced the data as participant observation, interview and focus group and survey, even though they were earlier discussed as methods of data collection. These sources were evaluated by applying the weighted average strategy because the quality of the data sources varied. The sources were also

assessed for divergence and convergence toward the key variables of poverty and development.

Assessing the quality of participant observation. Through active participation for short intervals in the lives of the participants the researcher collected information which expounded on the definition of poverty and development. In relation to poverty, information was collected on the physical living conditions, specifically on housing and the surrounding environment. The demeanor and level of engagement of the participants were captured as part of the data collected through this method. Values and meaning of functionings and the processes of development for the sample of rural women collected through this method were used to support data from interviews and survey. Data collected by participant observation was compared with that from focus groups, interviews and survey. The comparison revealed that most of the details about inadequate housing as an indicator of material poverty, unhappiness as an indicator of psychological poverty, and the value of being able to participate in community activities and having healthy relationship with children as social functionings and capabilities, would have been missing without participant observation.

Kern (2016) poses relevant questions as a type of internal auditing, as an approach to 'reduce the risk of systematic bias…be explicit about decisions and actively discuss the tradeoffs behind the choices [with the aim to] minimise measurement error [and enhance] the reliability and objectivity of measurement' (Leuffen et al. (2013, 41, 42 49).

In conducting this internal auditing, the researcher posed and discussed this question – did participant observation make a great contribution to the overall informational quality because it provided data that would have been missing? It must be noted that there are some limitations of participant observation regarding its contribution to data quality in this study. First, data collected through participant observation was highly dependent upon the memory and judgement of the researcher. Secondly, the input to the data set from participant observation was low, with contribution to only four of the 41 indicators (10 per cent of the information about the experiences of the sample of rural women). Additionally, from a theoretical perspective, as discussed above, the capability approach gives greater weight to the values and views of the research

participant, not those of the researcher. Furthermore, the underlying feminist epistemology of this study seeks to uncover the knowledge and voice of the sample of rural women, not those of the researcher. The tradeoffs behind choosing participant observation, apart from collecting missing data, was to build trust and directly capture how the research participants create knowledge about their quality of life and, in turn how they lived by that knowledge. Participant observation was more about process-tracing of the creation and application of knowledge by a specific sample of rural women. While the data is credible the steps to data collection might not be easily repeatable and might not yield the same outcomes for another group of rural women even in the same communities. Given these observations in which the limitations outweighed the contributions to the quality of the data collected through participant observation, this method was judged as being the least trustworthy source and hence received .3125 using the weighted average strategy of Leuffen et al. (2013), as noted above.

Assessing the quality of survey. The survey benefitted from the quality of information that was collected via in-depth interviews and focus groups. The accrued benefits were based on the diversity of the sample of rural women, their intergenerational experiences of poverty and development, as well as the rich description they provided. It must be noted that the survey was developed during fieldwork, hence it did not benefit from the high quality of in-depth interview and focus group data which were enhanced by two years of additional literature review, periodic feedback from research supervisors and the comments from expert panels at two international conferences. It contained a series of questions evaluating the functionings and capabilities of both project participants and non-participants. While it focused on aggregating the development dimensions of both groups of participants, it also gathered information on their state of poverty. The survey also summarised the impact of REDI and allowed the project participants to rank its impact on their material, social, psychological and physical functionings and capabilities. Employing primary data to develop the survey provided another layer of insight into the lives of the sample of rural women, which revealed relevant processes and opportunities associated with their development, as well as the meanings they ascribed to and the objects they value.

Although the survey served as a useful source in ensuring stability of responses across a range of questions, and distilled much of the rich descriptions into specific functionings and capabilities, it also reduced some aspects of the diversity of the participants. Still some of the questions were open-ended with the specific purpose of preserving some aspects of the diversity of their lived experiences. Efforts were made to preserve diversity through the use of open-ended questions such as, "name the reason why … is important to you?" as well as having questions with multiple responses, as guided by the interview and focus group initial outcomes. No other source focused on collecting specific information on the functionings and capabilities of the participants, which highlights the unique purpose of the survey. Overall, it provided exclusive information on 13 or 32 per cent of the 41 indicators in this study. The observations above about the survey as a data source suggest it produces good quality information that is trustworthy and can be replicated. A weighted average of 0.625 was assigned to the survey.

Assessing the quality of interview and focus group. Qualitative dialogues in the form of in-depth interviews and focus group were conducted with individuals and groups who had first-hand knowledge of poverty and development in rural Jamaica. Most of these participants were also directly involved in REDI, the poverty alleviation project. Most of the research participants lived in the same communities for most, if not all their lives, while some participants were the second and third generation of their family to reside in the same communities. In fact, mothers and daughters together were participants in all the communities, except Bath and Mongo Valley, while Treasure Beach was a tight-knit community with relatives accounting for approximately half the number of participants. These participants, who could be viewed as experts in rural development, provided a rich description of their lived experiences and participation in REDI. As previously mentioned, 43 of these research participants, while in their natural settings, shared their experiences through 18 in-depth interviews and nine focus group discussions.

Data from the community participants which was sourced through interviews and focus groups contributed to the development of the survey. That data was also used throughout the findings and discussions. Overall, knowledge about poverty and development as experienced by the sample of rural women was mainly inferred from

this data source. In fact, the input to the data set from in-depth interview and focus group was extremely high, as it contributed to all 41 indicators of poverty and development. However, interview and focus group data used in discussing the opportunities and processes of development were subdivided into participatory consumer perspective and management team perspective, with the former collected from the community participants and the latter from the project management team. This separation of data was vital for the assessment of convergence and divergence of perspectives on development.

While interviews and focus groups provided rich details and flexibility in representing the diverse experiences of the sample of rural women, coding the data was time-consuming. This coding was done over a two-year period, supported by verification through the literature, research supervisors and expert panels at two international conferences. One of these conferences supported the contextual aspect of this thesis with a focus on Caribbean development and was held in St. Lucia in 2015, while the other conference enhanced the theoretical aspect and was hosted by the Human Development and Capability Association in Japan in 2016.

Therefore, how did the information from the interview and focus group compare in quality to that of the participant observation and survey? On the positive side, information from the former sources is of a higher quality than the latter. This is so mainly because even though it is based on judgement, it is the judgement of the participants, and theoretically is more valuable than that of the researcher, in explicating knowledge about lived experiences of the sample of rural women (Sen 1999; Tanesini 1999; Campbell and Fenow 2009; Gray et al. 2015). Furthermore, the sources gathered information from participants with first-hand cross-generational recounting of diverse living experiences. Although the data collected via the interviews and focus groups could have been biased due to the researcher effect (Sherif 2001), participant observation confirmed most of their narratives and further verification was sought from academic experts and international scholars and development practitioners. Yet, the main problem with interviews and focus groups was the small sample size, which is representative of neither the total number of project participants nor the rural population. Hence the knowledge inferred cannot be generalised. Based on the observations above, in which efforts aimed at enhancing the quality of the data

substantially outweighed the limitations, interviews and focus groups were judged as being the most trustworthy sources and hence were given the highest weighted average of 1.25.

6.7 Summary

In summary, this chapter outlines the research design and describes the methodological framework deemed relevant to interpret poverty and development from the perspective of a small sample of rural women. This is informed by feminist epistemology which emphasises women as creators of knowledge. In order to collect information from rural women in their capacity as creators of knowledge, specific tools, techniques and procedures were employed. In-depth interview and focus groups were used to allow the sample of rural women to narrate their lived experiences in familiar settings. Participant observation was helpful in validating some aspects of their narratives, while providing opportunities to probe deeper into their reality and community life. Questionnaire survey, which benefitted from the quality of information collected through in-depth interview and focus group, provided stable responses across a range of issues and diverse groups of women.

The sample consisted of 85 rural women who ranged between the ages of 15 years old and 88 years old, in varied stages of poverty and development. A small sample of five men and four members of the REDI project management team also contributed to the study. Data from these research participants were collected sequentially to build up the quality of the data. Data collection via fieldwork was carried out over a six-month period in rural Jamaica. Data analysis was systematic and depended heavily on drawing inferences from both qualitative and quantitative data sources. Triangulation was very useful in not only the data analysis but also in enhancing the validity and reliability of the data, findings, discussion and conclusions. The application of the weighted average strategy of triangulation made explicit the judgement of the researcher in employing the various methods and techniques. It also reported the influence of each method on the data quality and implicitly the findings and conclusions. Overall, ethical integrity was maintained during and after the fieldwork, with special effort aimed at preserving the anonymity of the participants and maintaining boundaries between researcher and participants. In the following chapter the findings from the data will be presented in order to address the research questions.

Chapter 7. Presentation of findings

7.1 Introduction

Jamaican women are diverse in many ways and great effort was made to capture and present their diversity in the four sections of the findings. While some of the findings might present their differences as harmonious, their lived realities varied. The diversity of the Jamaican women was depicted and celebrated by the Jamaican band, Fab-Five (1987) in their song entitled, *Jamaican Woman* – as the song hilariously describes women in each of the 14 parishes, with varied characteristics:

> *Now every country say they have nice woman*
> *But some not so nice you must understand*
> *Well Jamaican woman a sugar and salt and I man will tell you about them all*
> *Ready!*
>
> *Jamaican woman a sugar and salt*
> *Some a dem a ginnal [are deceptive] an' will make you bawl*
>
> *St Andrew woman nuh mek [don't make] them fun leave them man alone or them will make you run*
> *St Thomas woman is very kind but as you wink you eye, them bruck a line*
> *The Portland woman can sport fi true but treat them good an' them will die for you…*
> *St. Mary woman them nice alright but them love them man and them quick fi fight*
> *St Ann woman them have good ways but if yuh [you] trouble them, them will give yuh nine days*
> *Trelawny woman is a serious lot and when you need a friend them always on spot…*

It is in their diversity that many found sources of freedom for themselves and their families, and paradoxically, such diversity is also a source of weakness. Therefore, the presentation of the findings sought to illustrate some features of their heterogeneity in their poverty and aspects of development.

The key findings emergent from analysis of the data are presented in this chapter. Presentation of the study findings has been structured to address the research questions as documented in the previous methodology chapter. The main research question asked whether poverty reduction programs of the Government of Jamaica were effective in transforming the lives of rural women. Data concerning aspects of everyday life for a sample of rural women were analysed to address the primary research question as well as to evaluate the impact of a poverty reduction project on some dimensions of their

poverty. The following four sub-questions were used to structure data gathering as a basis for a detailed examination of the participants' responses:

1. What is the definition of poverty from the perspective of rural women?
2. What are the relationships between material, physical, social and psychological dimensions of poverty for rural women?
3. How did the REDI project impact their material, physical, social and psychological dimensions of poverty?
4. What constitutes transformation for the sample of rural women?

Data collection involved both structured and unstructured techniques in order to preserve the more personal perspectives provided by the study participants (Creswell and Plano Clark 2011). Connection and trust between participants and researcher were harnessed throughout the data collection process to facilitate deeper and broader insights into the personal views of the study participants (Connelly and Clandinin 1990). Results presented in this chapter were generated from the qualitative data collected through in-depth interviews, focus group discussions, and participant observation, along with quantitative data from a questionnaire survey. The survey was developed from the narratives of the participants, as a strategy to preserve the participants' personal insights and opinions throughout the data collection process (Connelly and Clandinin 1990).

Presentation of the findings is in four sections (Sections A-D), which reflects the structure of the research questions. Data analysis and presentation of the findings were aided by content analysis using the software application NVivo, computer-assisted qualitative data analysis software package (CAQDAS) and another application called Statistical Package for the Social Sciences (SPSS).

Thematic and content analyses as well as detailed coding of the qualitative data uncovered poverty as a multi-dimensional phenomenon with four dimensions and 29 indicators. These are outlined in Table 7.1.

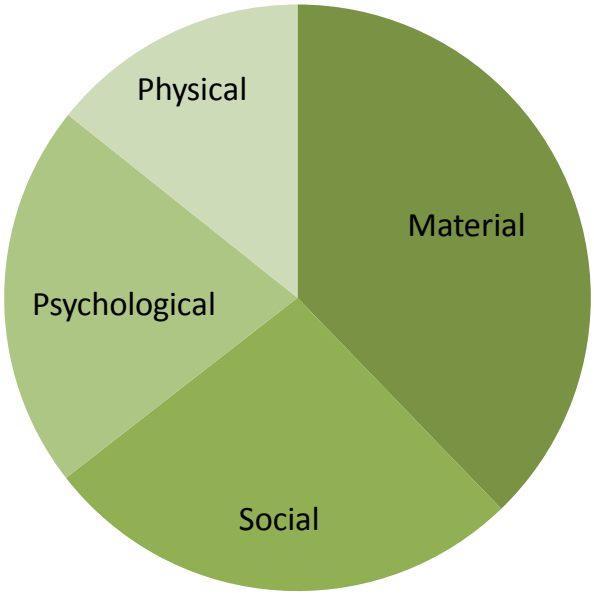
Table 7.1: Dimensions and indicators of poverty for sample of rural women

Dimension	Indicators
Material	- Insufficient income - Unemployment and underemployment - Insufficient food - Limited access to utility and facility - Inadequate housing - Underutilised and insufficient resource - Inadequate clothing - Inability to pay bills
Social	- Dependence - Neglect - Abusive relationship - Social exclusion - Lack of recognition - Inability to nurture children - Praedial larceny
Psychological	- Depression - Embarrassment and shame - Mental myopia (narrow-mindedness) - Laziness - Doubt and fear - Low self-worth - Discouragement - Unhappiness - Fatalism
Physical	- Poor bodily health - Low level of formal education - Lack of participation in productive activities - Limited skills set

Section A provides findings relating to the first research question, which sought definitions of poverty from the perspectives of the sample of rural women. However, the perspectives included in this section also contain the viewpoints of men. Uncovered during the fieldwork were situations where identified participants frequently engaged in communal everyday living including both women and men together in their natural social, productive and religious settings. These social arrangements of communal living with men directly influenced the perspectives of the women and represent a lens that shapes their identity and reality.

7.2 Section A: Rural women's definitions of poverty

The indicator labels were developed by the researcher to represent concepts introduced by the participants in their definitions of poverty. Analysis of the data based on coding density, that is the frequency of a concept in the dataset, was used to guide the order in which the dimensions are presented. This order is not a ranking of the dimensions



but rather it reflects their frequency in the dataset. Figure 7.1 Density of poverty by dimensions illustrates the aggregated coding references for each dimension based on the shades – the darkest shade represents the most densely coded dimension and the lightest represents the least coded dimension. That is, Figure 7.1 Density of poverty by dimensions shows that the participants described their experiences of deprivation more frequently as material poverty, while experiences of physical poverty were mentioned the least.

Figure 7.1 Density of poverty by dimensions

Presentation of the significant findings for the identified dimensions and indicators is provided below, and is ordered according to dominance of discussion, commencing with material poverty and then exploring social, psychological and physical dimension of poverty. The presentation is augmented by figures, charts and tables.

7.2.1 Material dimension of poverty

Analysis of the qualitative data revealed eight material indicators of poverty. Each indicator was then ranked based on the number of coded sources in the data set. The following order resulted from that ranking – starting with the most frequent indicator and ending with the least: insufficient income, unemployment and under employment, insufficient food, limited access to utility and facility, inadequate housing, underutilised and insufficient resource, inadequate clothing and inability to pay bills.

Figure 7.2: Density of material indicators of poverty illustrates this ranking, with the most frequent indicator (insufficient income) having the darkest shade and the least frequent (inability to pay bills) having the lightest shade.

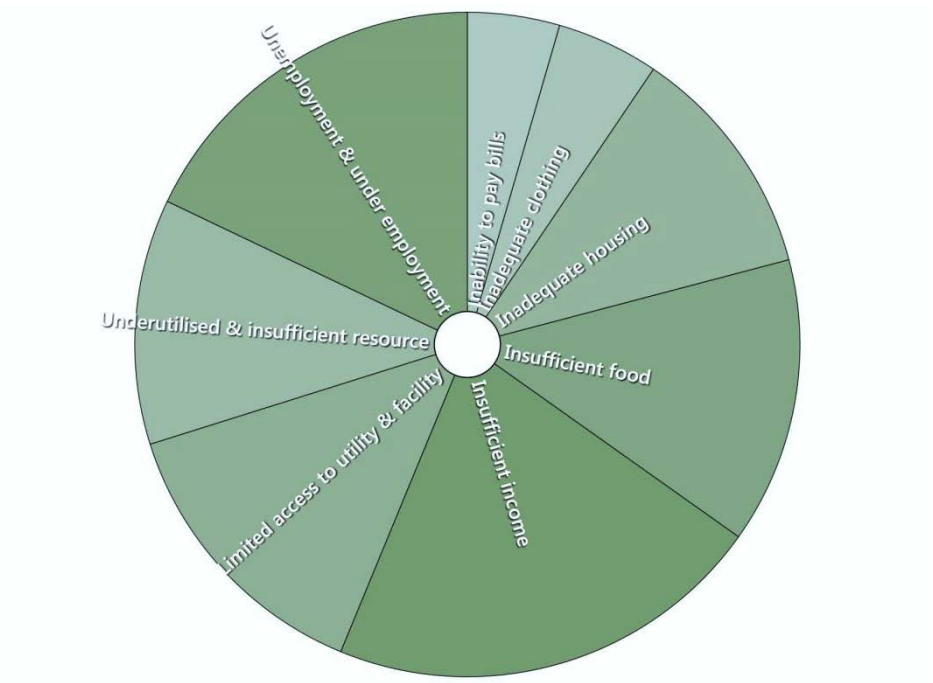


Figure 7.2: Density of material indicators of poverty

Insufficient income: Participants discussed both lack of and insufficient income as aspects of their poverty. Income referred to what the participants described as cash in hand they received either as wages or money from relatives, friends or partners. Lack of income meant they had no money from either of those sources. Insufficient income referred to having money to meet one or some, but not all of their needs. Participants had more discussions about lack of income, mainly as hindrance to fulfilling social responsibilities, specifically, caring for their children by providing them with food and education. In Bath and Maggotty communities, the participants mainly discussed lack of income, while in Mango Valley, Prospect and Treasure Beach the discussion was more about insufficient income.

Regarding the causes of lack of income and insufficient income, some participants noted that limited job opportunities and working unpaid were the main causes. A minority mentioned laziness as a contributing factor:

> *Poverty is due to laziness, because I see in Jamaica a lot of families, couples they just have children, children, children and both of them don't know where the next penny is coming from…* – 72-year-old mother of two children and retired health worker

Furthermore, some participants expressed having insufficient money due to competing needs, as stated by a 28-year-old mother, of one child and pregnant, caregiver and personal service worker:

> *Sometimes I cannot find food and I consider that as poverty. Although I am working, at the end of the month the bills have to be paid and sometimes I am just left with a $1,000 and having a child you have to ensure that he is ok. I have to pay rent, electricity, 'Don's' school fee and lunch bill. Sometimes being poor, you are unable to pay your bills or buy clothes.*

Some participants noted loss of investments, underutilised resources, low farm yield and poor bodily health as constraining factors. Ill-health depleted the income of one participant and caused him to stop farming and his wife became the breadwinner for the family. He explained:

> *I had a serious illness in 1991 that brought me down very low… When it started acting up I had to stop working for 6 months. Later on when I felt better I went back to work but it eventually got worse and so I had to stop farming. It was the greatest set-back for my family because we had to use all savings on my health – travelling to private doctors and medication. My wife had to take on the responsibility of main bread-winner. This was our greatest financial challenge and we haven't fully overcome it.* – 55-year-old father of two children, caregiver and entrepreneur

Some of the women spoke about working but not earning enough, which contributed to them *living from hand-to-mouth* and having no financial resource to convert during 'tough' times, as noted by a 62-year-old grandmother, caregiver and subsistence farmer:

> *There are certain times in life, if you do work you may only have enough to pay your taxi fare or bus fare and you cannot get anything else from it; you cannot get any savings out of it. So you just working to feed yourself or you have to go out and beg and whatsoever… You don't have enough [money] to take you to the doctor or to put a little in the bank. You work but you still don't achieve anything.*

Domestic workers received low income which appeared to be insufficient to meet their desired needs. The participants in the Mango Valley community recalled:

> *… There were women in the community like age 30 and older who were sort of crying out that they couldn't find any job. They said that when they go to Ocho Rios and do the domestic work they only receive enough money to pay their transportation fare and nothing else – they only pay the fare to go and come with the money they received and it wasn't working out for them.* – Mango Valley community focus group

Insufficient income and lack of income inhibited research participants from traveling, visiting the doctor, paying for medical treatments, sending their children to school, buying food and meeting other basic needs such as buying clothing and paying for adequate housing. Inability to pay bills consistently, such as rent, electricity and water usage, was part of the hardship they experienced as a result of insufficient income.

Unemployment and underemployment: This referred to what the participants described as lack of employment and being unable to secure full-time jobs. Their descriptions included short-term and seasonal jobs, as well as long periods of unemployment.

Participants in all five communities experienced the challenges of unemployment and underemployment. Participants in Mango Valley and Bath contributed the most to the discussion regarding unemployed and under employed. Unemployment and underemployment were manifested mainly as lack of employment. Lack of employment appeared to be influenced mainly by absence of job options, over-reliance on agriculture and obligations to caregiving roles and responsibilities. Furthermore, at the time of fieldwork, there was no evidence of productive outputs from the agro-processing factory in Mango Valley and the greenhouse enterprise in Bath.

In their discussions of unemployment and underemployment, a recurrent cause was lack of employment opportunities. A 53-year-old mother of two children, grandmother and unemployed lamented: *I did a little work five years ago, so from 2011 I don't get another job from that; and now is 2014 almost 2015 and I don't get any job.*

Other reasons stated for unemployment and underemployment were lack of skills, illiteracy, seasonal jobs, laziness, low farm yield, disease-affected agriculture produce, and failed investment. Secondary school-leavers were described as having no employment options even after gaining qualifications. Conversely, others lacked the qualifications for their desired employment options, while some were unemployed and

not seeking work. The following quotes illustrate this constraint that youth were faced with:

> *I wish the government would do more for young people. You go to school and getting all the subjects but at the end of the day you still cannot get any job. So I wish the government would get more jobs for young people…* – 28-year-old mother of one child, pregnant, caregiver and personal service worker

> *In Mango Valley when children leave school they didn't have anywhere to go – they didn't always receive a proper education, and even when they have subjects they're not able to move on [improve their knowledge through higher education, skills training or a job], some children don't move on…* – Mango Valley community focus group

Agriculture was the sector in which most participants had employment opportunity. However, there were several factors which caused it to be an unreliable source of employment. First, agricultural production was seasonal and there was limited market for some products. For example, agro-processing of jams, jellies, bammy, wine, pickles and pastries was seasonal and mainly at the promotional level, with the Rural Agricultural Development Authority (RADA) as the only identified market. Second, agricultural production was generally low. For example, farming, animal husbandry and poultry rearing were mainly at subsistence levels and participants mentioned several failed investments. The women in Mango Valley recounted one of their failed attempts at beekeeping:

> *The Beekeeping Association of Jamaica came in and we got training on how to manage and keep an apiary… in 1997… We had an apiary; we had the apiary for about 2 years. But there was this disease that came about and brought us down with it; killing every last one – the disease killed the bees.* – Mango Valley community focus group

A few of the participants explained a state of near paralysis as a debilitating factor in relation to insufficient job opportunity. One participant in Maggotty explained being confronted daily by unemployment and inadequate job options to a point in which she became oblivious to the passage of time. Another participant in Treasure Beach observed a similar sense of paralysis of fishermen, as illustrated in **Error! Reference source not found.**.

Box 7.1 Unemployment coupled with social factors contributed to a form of paralysis

The men are now unemployed because they are illiterate and they were not going to school because you don't need to read to learn how to fish so they were never encouraged to go to school. There is a high rate of illiteracy because there is dyslexia which is very high in this community which is a genetic disease.... We are seeing a lot more women going out and getting jobs and working and so they are now the main breadwinner.... Then again, with tourism going up there are more jobs for women because of the [need for] housekeepers and cooks.... The man losing his power-base and again domestic violence rises and so on. The men sitting down and can't do anything so they get very frustrated. So [gender] dynamics have changed greatly over the last 20 years.

Narrator: 52-year-old single woman, no children and rural entrepreneur

Caregiving roles and responsibilities appeared to be an aspect of their lives which influenced job selection for participants in all five communities, as expressed below:

> *Sometimes I do the hotel programme, so sometimes I do work... [But] sometimes you can't leave your family, especially when you have girl-child, not because you want the money – you have to respect your family.* – 42-year-old mother of four children, caregiver and personal service worker (seasonal) in Maggotty
>
> *...Some members left the farm for better options and because we had stopped receiving the stipend [from the government].... A lot of us here like the farming, so we continued farming and at the same time we have children to send to school so we mostly take home produces and vegetables to cook so that we don't have to go to the market and spend that extra money...* – Bath community focus group
>
> *I struggle a lot because I don't work and I have two children... one [has a baby] (pause) but I am still responsible for her because if she is hungry I still have to fret the same way and the other one going to school* – 53-year-old mother of two children, grandmother, caregiver and unemployed in Treasure Beach
>
> *I work hard to send my children to school. If I were to have the cash I spend to send them to school a trailer would not be able to draw that money.* – 54-year-old mother of three children, caregiver and subsistence farmer in Prospect
>
> *...When school is in session I would be at school selling things and during the holidays I'm at home with my kids...* – 42-year-old mother of three children, caregiver and unemployed in Mango Valley

Insufficient food: Lack of food meant having no crop to harvest on smallholding farms as well as the inability to purchase food items. Limited food, though similar, referred to having some type of food while lacking others. Over 70 per cent of references for this indicator related to lack of food and hunger, while the others were about having inadequate food.

Lack of food appeared to be the more pronounced form of deprivation for most participants and was mainly caused by insufficient income and low farm yield. In general, Bath and Maggotty were the communities mostly affected by insufficient food.

The participants viewed provision of food or the need for food as an essential part of their lives. Inability to provide culturally accepted basic meals were mentioned in their explanation of insufficient food. Their discussion of food items that were sometimes absent from their meals included tomatoes, sweet potatoes, callaloo, meat, flour, tin mackerel, pig head and feet, chicken, rice and sugar. Food was limited when they had to *drink 'Cerasee' tea alone*, and *eat dumpling with butter*. Yet the absence of food and deficient portions were only two parts to their meaning of insufficient food. Another aspect was the presence of their hungry children as noted by a 37-year-old mother of three children, caregiver and subsistence farmer:

> *Poverty is sometimes when you wake up in the morning and you can't find food to eat and you have children crying for hunger and you can't even draw some bush-tea and give them – that is what you call poverty – or not even to cook a little all-in-one pot.*

Some of the women expressed concerns that *sometimes* they *struggle* to buy basic food items, while others described instances when they had no food to eat. The participants lamented that efforts to provide food for themselves, their children and family members were often thwarted by many factors, such as low farm yield, lack of money, death of a breadwinner, old-age and abusive relationships. Additionally, they observed similar factors that affected other community members. Subsistence farmers in the community of Bath lamented that:

> *Right now I am worse off because look now, nothing we don't have to carry home from off the farm, like two tomatoes and one sweet potato to make up in our pot to avoid you from buying it, not even little tomatoes or callaloo – nothing we don't have to carry home, nothing.* Bath community focus group

Along with their personal experiences of having no food at times, they also observed the hunger of other community members – such as people living on the street and the elderly.

Limited access to utility and facility: Limited access to utility and facility referred to being unable to access or having restricted usage of publicly provided services. The utilities discussed were access to electricity and water, while facilities were health care services, educational institutions and government agencies.

Limited access to water and educational institutions were the main forms of deprivation regarding access to utility and facility. Prospect was the main community affected by limited access to water and Mango Valley was the worst affected by lack of access to educational institutions.

The data revealed that limited access to water supply was the main concern while access to electricity was the least concern among participants. Farmers in Prospect and Treasure Beach communities grieved over the high cost of water and the limited sources from which they were able to access water for farming, namely, rain or pay to transport water. Drought was a major barrier in accessing rain water, especially in Prospect (see Box 7.2) and Treasure Beach communities.

Box 7.2 Farming with limited access to water: Plight of Prospect farmers

Because there is no irrigation we don't enjoy the benefit of irrigation water in this Community [Prospect], so what we have been doing is buying water, trucking water; because the rainfall was so low for the last couple of months we were not able to harvest any water. Well, thank God I think two days ago we got some [rain]. But we have set up the guttering system to harvest the water so if we get continuous rainfall we would be able to harvest water because we realized that that [limited access to water] would have been one of our drawn backs because water is one of our main source in operating the facility. But now we are spending a lot of money on water by trucking water, so in the meantime we are hoping that we can get around that.

Narrator: Participants of Prospect community focus group

In the absence of health care facilities participants stated that they travelled outside of their community for medical services, others visited private doctors, while some used home remedy to cope with lack of and limited access to health care services.

Regarding educational institutions, Treasure Beach had one primary and three pre-primary schools. There was no secondary or tertiary institution in the community. Similarly, Prospect had only one primary school and Mango Valley had only one pre-

primary school. Maggotty and Bath both had primary and secondary schools. In general, none of the communities had tertiary or vocational institutions. Participants noted that limited access to educational institutions contributed to hardships within most of the communities as illustrated by Box 7.3.

Inadequate housing: Inadequate housing referred to unhealthy living conditions and structural defects. Participant observation revealed numerous cases of unhealthy living conditions, specifically, poor kitchen quality, makeshift bathroom and lack of toilet. Unhealthy living conditions, associated with some structural defects, were the most common feature of inadequate housing. Participants in Bath and Maggotty appeared to be most affected by inadequate housing.

Box 7.3 Valley of broken dreams? Thwarted access to education and economic opportunities in Mango Valley

Mango Valley Visionaries Friendly Society is an enterprise known for its agro-processed products across Jamaica. This group of women also venture into cushion making, organic farming and skills training. The society started in the 1970s with the vision of turning the wastage of apples and guavas into economic opportunities for unemployed and underemployed young women in the community. With the vision of venturing into agro-processing, the group requested help from the Rural Agricultural Development Agency (RADA), a department of the Ministry of Agriculture and Fisheries. The first Home Economics Officer from RADA had no knowledge of agro-processing, but instead spent a year teaching the group cooking and sewing. Another Officer replaced the first; she too had no knowledge of agro-processing, but instead taught them farming. About the third year a new Officer was assigned to the group, this Officer had knowledge of agro-processing. Under her guidance, the group innovated jams, jellies, wine, and bammy. After over two decades of innovation in agro-processing the group of 12 ventured into basketry production, as well as coordinating classes for remedial Maths and English, with the help of HEART Trust NTA in 1997. These trainings were open to members of the community because there was no other school or skill training institution, apart from a pre-primary school. Community members were employed as trainers and taught other members. A few years later the training changed to agro-processing, house-keeping and food preparation. This training attracted participants from over six adjoining communities, training over 80 participants each year and helping to do job-placement for some of the trainees in the tourism industry. However, in 2009 the HEART Trust NTA training at the community centre in Mango Valley was closed down by the government, after approximately 13 years of skills training for over 1,000 youth and adults. At the time of this interview the agro-processing factory was out of operation. Additionally, a small group of about ten youth (female and male) were being taught housekeeping and food preparation in a small room at the back of a church by some of the women from the group.

Excerpt from Mango Valley community focus group (women)

Poor kitchen quality was the most common feature of inadequate housing. In the majority of the homes visited, it was observed that one room served as kitchen and bedroom or living-room, with no running water and poor ventilation. Another feature of poor kitchen quality was inappropriate storage of dishes and utensils, where they were washed and stored at the back of the house on a makeshift table and open to the environmental elements.

Another common feature of unhealthy living conditions was the use of makeshift bathrooms. These bathrooms were generally constructed using zinc and cloth and erected at the side or back of the houses, with inadequate sewage system. Other health hazards in some of the homes were lack of access to running water, usage of untreated harvested rain water, operation of poultry rearing near to living areas, as well as the threat of fire in cases where rooms served as kitchen and bedroom. Additionally, several families shared pit-toilets due to the absence of sanitary facilities. There were cases of shared pit-toilets in the communities of Bath, Maggotty and Treasure Beach.

The women in the Maggotty community focus group spoke about the structural defects of their houses and mentioned their aspirations for better living conditions. In disclosing their inadequate living conditions, one woman revealed:

> *I am poor, like how my house top [roof] is leaking… My kitchen top [roof] was torn-off … When it rains it [the roof-top] leaks and I have to set bucket to catch the water… Right now it would be good if someone could buy 5 sheets of zinc for me… Or if I could get one of the board houses from Food for the Poor – two bedroom kitchen and bathroom…* – Maggotty community focus group (women)

Box 7.4 Experience of an elderly couple living in deplorable conditions in Maggotty

> *The couple was in their late 70s early 80s. The lady was blind and her husband could hardly walk. The house and living condition was so bad! The roof was leaking, rotting and dropping on their bed where the lady was lying. There were old rags hanging up at the windows, and the rain was blowing in and wetting them up. I said to myself: "No, this is far below the poverty line." They had no food and the husband would go to the river to try and catch two fish, which if he didn't catch, there would be nothing to eat.*
>
> **Narrator: 45-year-old father of two children, caregiver and subsistence farmer**

Some of the structural defects were leaking roofs, lack of toilet and lack of bathroom. Furthermore, there were few cases in which adult partners and children shared one

room. Participants highlighted cases in which people lived on the street because of lack of housing. Some of the women viewed poverty as not being able to own a house.

Deplorable living conditions were associated by participants with the lack of employment opportunities and being elderly, as noted in Box 7.4. Others spoke about poor housing and the absence of housing without stating a cause, which suggested that inadequate housing might have been a common feature of their existence. Many of the participants spoke about inadequate housing in absolute terms.

For example, a member of the Maggotty focus group expressed the need for a good house, particularly as the participants in the Mango Valley focus group bemoaned the situation of inadequate housing for some members of the community and empathised with their need for decent housing. In Treasure Beach, a 42-year-old mother of three children, caregiver and business manager associated an unfortunate person with the absence of a home. Similarly, a 72-year-old mother of two children and retired nurse identified the poor as those without a home. In another interview with a 47-year-old mother of two, caregiver and manager, she was empathetic of those without a home.

Underutilised and insufficient resource: Resources discussed by the participants were related mainly to agriculture. Those resources were manual labour and products for farming such as fertilizer and seedling, land, facilities, farming tools, equipment, animals and financial resources. Participants noted that the main underutilised resources were labour and land, yet others considered that labour and land were insufficient. Other insufficient resources identified by the participants were seedlings, fruit, financial capital, fertilizer, tools and chemicals as well as knowledge, skills and time.

All five groups articulated the hardships of insufficient and underutilised natural resource. Underutilised and insufficient labour was the main challenge for the participants with the worst affected groups being those in the communities of Mango Valley and Bath. Participants in those communities were mainly unemployed, had limited skills set and underutilised assets.

Land was one of the main resources discussed by the participants. Most participants were farmers who carried out subsistence farming on small plots of land close to their homes; few farmed on multiple acres that which they noted as underutilised.

Labour was another resource commonly discussed. In most communities there appeared to be a system of hiring causal labourers to plant, harvest and maintain farms. Participants discussed having insufficient labourers to cut grass and spray fertilizer, as well as the need for more men on the farms. Additionally, there was insufficient compensation for manual labour as in the case of some women who were working on farms with little or no compensation. For example, in Bath community, women in the focus group discussion explained their under-compensated work:

> *Most of us continue, even though we do not earn a consistent income from the farm, because we don't have any other source of income or support…We are working without pay…*

Others acquired skills in greenhouse farming, beekeeping and animal husbandry and they expressed that these skills were underutilised. Closure of employment opportunities was a major factor associated with underutilised skills and human capital.

In the context of Mango Valley, due to temporary closure of the agro-processing factory within the community, all the participants and some community members were without a job. Furthermore, the skill training program in Mango Valley was yet to be resuscitated since it was closed down in 2009. Similarly, there was an influx of underutilised human capital in Prospect and surrounding communities due to the closure of Alumina Partners of Jamaica (ALPART) in 2009. All seven (7) participants of the focus group were negatively affected. Four of the participants were without jobs after approximately 20 years of stable employment with ALPART. The other participants lost the benefits of the community program, which was operated by ALPART. This program provided assistance in the form of access to land, water, seedlings, fertilizer, and ploughing of farm land. This contributed to insufficient resources for farming in Prospect.

Along with closure of employment opportunities, some participants attributed underutilised human capital with lack of preferred employment and laziness. Laziness

was associated with underutilised human capital especially in cases of unemployed young and physically-abled community members. For example, one participant in Prospect lamented the lack of participation in productive activity by youth due mainly to the absence of their preferred employment option and low levels of education:

> *When people look on themselves as being too good to do certain work [farming]… Some people are too 'boosie'. The young people, what they want to do [office work] they can't do because they don't have the education for it.* – 47-year-old mother of four children, caregiver and subsistence farmer

Participants discussed insufficient farm produce as a result of praedial larceny (theft of agricultural produce), disease and natural disaster such as floods and drought. On the other hand, participants stated that there were cases of wastage of fruit and other produce due to lack of market and inability to process them. Their farm yield was also affected by inadequate soil, lack of fertilizer, tools and seedlings.

Inadequate clothing: Inadequate clothing meant lack of shoes, clothes, and bed linen as well as wearing inappropriate clothes to church and school. The women in the Mango Valley focus group expressed the need for clothing, along with food and housing, as a collective of essentials for living. Those with inadequate clothing were school children, mothers and women going to church.

Cases of inadequate clothing were mainly discussed by participants in Maggotty and Treasure Beach. Overall, these cases were about inadequate uniform for children and general clothing.

The participants shared several examples of how some community members depended on others to help mitigate their need for clothes, shoes and bed linen. In the community of Treasure Beach, a 57-year-old mother of eight children, caregiver and personal care worker retold how members of the community helped to address the need for clothing. She recounted:

> *Mr. 'Blue' has an office out there where they give out things and you can really see the needy people because they turned up. They turned up for the food they turned up for shoes and they turned up for the clothes.*

In cases of limited money some women forfeited their personal need for clothing to meet the needs of their children. For example, a 72-year-old mother of two children and retired nurse recalled her personal experience of sacrificing for her children –

> *I remember when I only had one pair of shoes…. I had to put cardboard in my shoes so my children did not have to go without; I did without so that they could have. [In one instance] I went to a shop to buy shoes for myself but then I remembered my two children had other needs – I left the shoes and bought what they needed and went without [the shoes].*

Inability to pay bills: The hardships of poverty experienced by the participants included inability to pay bills. Bill payments referred to paying for house rental, water and electricity usages.

More participants commented on their inability to pay bills for electricity and water than for the other bill payments. Challenges to make these payments were mainly associated with insufficient income. The participants stated that they were unable to cover bill payments mainly because of insufficient income. Furthermore, some participants lamented the coupling of high cost of utilities with competing needs and limited money. For example in Treasure Beach, members of a focus group discussion declared, w*e don't get enough finances to pay bills and send children to school…. I cannot pay my water bill even though my water was cut off – the bill was too high and then they cut it off.* Similarly, another participant noted, *sometimes being poor, you are unable to pay your bills… Because my work is seasonal sometimes I owe two month's rent but my landlady is very understanding.*

The participants stated that they built their own houses and lived with relatives as ways to reduce the need to pay rent and other bills. Some added that they were unable to operate their businesses without access to light and water, while others accepted the loss of access to water due to non-payment of bills.

7.2.2 Social Dimension of Poverty

Thematic analysis of qualitative data revealed seven social indicators of poverty for the sample of participants. After ranking each indicator based on the number of coded sources, the order is as follows – starting with the most frequent indicator and ending with the least: dependence, neglect, abusive relationship, social exclusion, praedial

larceny, inability to care for children, and lack of recognition. Figure 7.3 Density of social indicators of poverty illustrates this ranking, with the most frequent indicator (dependence) having the darkest shade and the least frequent (lack of recognition) having the lightest shade.

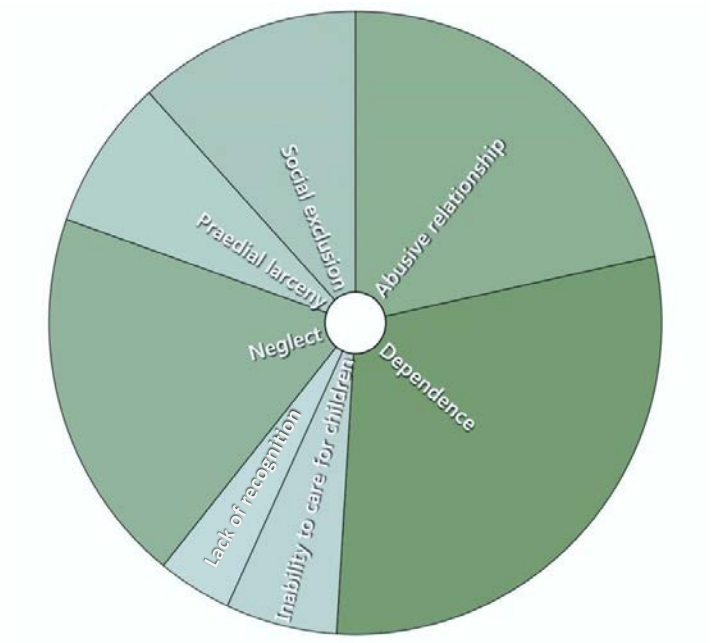


Figure 7.3 Density of social indicators of poverty

Dependence: Dependence was perceived by the participants as being vulnerable, weak and helpless as well as being subordinate and over-reliant on others. Most participants discussed over-reliance on others for money, such as intimate partner, friends and neighbours. Some were dependent on others for food, clothes and home. From the researcher's observations, some relied on others for sanitary facilities such as bathroom and toilet. Still a few expressed instances in which they depended on the government to assist them with community facilities and housing.

Dependence was a major concern across all five communities but it was mainly discussed by participants in Treasure Beach. Participants were mainly concern with women being dependent on men.

Dependence was described by some participants as a source of shame in reference to what they were unable to do and be in situations of dependence. One participant

bemoaned that being dependent reduces the ability and freedom of a woman to personally meet essential needs, such as food and clothes. She described dependence as a state in which some responsibility and freedom of the woman are transferred to another person, as if to create an infantilised self. She declared:

> *Dependence is not nice. Can you imagine you having to wait for someone to say here is money go and do the shopping for you to eat, or if you want a panty or a bra or you want a pair of shoes you have to wait for that man to give you money in your hand?* – 72-year-old mother of two children and retired health worker

Similarly, dependence was also associated with inability to care for oneself, as in being weak or a state of infantilism. Echoing this view, one participant stated:

> *For me I don't want to depend on someone, I can do things for myself because I am not feeble or old. When you are feeble or old you want to depend on somebody to do things for you because you can't do it for yourself.* – 57-year-old mother of eight children, caregiver and personal service worker

Dependence was not only associated with deprivation but also with having a poor quality of life. While describing poverty one participant, a 42-year-old mother of five children, caregiver and self-employed, declared her personal state of dependence as an example of poverty. Similarly, members of the Maggotty focus group included in their description of poverty an example of a person who was dependent on others for food. Amongst some of the participants, there was a sense of vulnerability and insecurity brought on by having to rely on others. One participant explained: *A poor quality of life is when you don't have anywhere to go and have to depend on somebody at all times, because when you rely on somebody it's not all the time they will have it [something] to give you…* This explanation came from a 62-year-old mother of four children, grandmother, caregiver and subsistence farmer who lived with her son and his family.

The belief that the Jamaican society in general may have adapted to a state of being dependent in some aspects was expressed by participants across all five communities.

> According to participants in the Mango Valley community focus group: *Some women feel that man is the answer… [To take them out of poverty]*

The Prospect community focus group lamented: *We have a mentality in Jamaica that we must always get hand-out! Hand-out!*

In the Treasure Beach community one participant, stated, *I have seen poverty but sometimes I wonder if they do it because they know that there will be someone out there that will always give to them.* – 72-year-old mother of two children and retired health worker

In the Maggotty community *I started a course in Mandeville last year November…I didn't have the money needed for travelling but anyway I signed up for three days per week. I remember once I didn't have any money and when I got to Maggotty someone gave me $200 and I got a ride from here to Santa Cruz – there I saw a friend from foreign and she gave me $2,000 and I held it up and say thank you God because you know what I'm going through…* – 42-year-old mother of four children, caregiver and seasonal personal service worker

However, personal evaluation by most of the participants themselves indicated a strong aversion to being dependent. During the interviews and focus group discussions most participants openly expressed their dislike for dependence on others. Some of those expressions are highlighted below.

…We can't sit down and depend on the people all the time, we have to help ourselves. – Bath community focus group

…As I told you earlier, I need a job so that I don't have to sit down and depend on my boyfriend… – 42-year-old mother of five children, caregiver & self-employed

I like to see when women feel good about themselves and not having to depend on a man…You don't have to depend on a man, you can help yourself…You can take yourself out of poverty – you can own your house, you can own your own land you can own something for yourself without a man. – Mango Valley community focus group

Abusive relationship: An abusive relationship may be identified as a pattern of offense based on the intent to control or intimidate a person or group and it tends to escalate over time. Narratives associated with abusive relationships described forms of physical, psychological or verbal abuse, praedial larceny and harsh parenting practices.

Physical abuse from an intimate partner was the main manifestation of abusive relationships. Participants in Treasure Beach reported the most cases of abusive relationships.

Box 7.5 Transgenerational abuse: From the slave plantation to independent Jamaica

I grew up with my grandfather on the slave plantation and in the loving arms of my grandmother until I was 8- years-old. She nurtured me with love along with her seven biological children and the other 51 children she nurtured in the community. At 18 years-old I ran away from my abusive father in search of my mother… I boarded with my Aunt but was later evicted because of my refusal to give into sexual assault from my Aunt's husband. I finally met my mother, who was an alcoholic. She opened up and told me that I was the only child she didn't want and that I was almost born in the toilet and that she should have flushed me…[crying and sighing…ah, that pained]. I looked at her and said: 'I love you so much'. I gave her enough time, I felt her pain (of previous abuse) and we grew to love each other… At 21 years-old I became pregnant for my long-time boyfriend but we separated before the child was born… Few years later I married my husband – the saddest story of my life [sigh] – abusive, abuse in the fullest form, abuse after abuse, physical abuse… At one stage I almost lost a child because he had kicked me so badly…I couldn't work because he wanted me to have a baby every year…He would hit me in the eye and burn me… He raped and strangled me in front of our children… I ran away with my children but he found me and broke my knee…

Narrator: 71-year-old mother of seven children, retired public servant

One of the most striking observations to emerge from the data was the description of physical abuse. Physical abuse appeared to have occurred mainly in intimate partner relationship but also in parent-child relationship.

Some of the narratives of physical abuse in intimate partner relationships are highlighted in Box 7.5 and the following quotes.

> *At eight months [of pregnancy] my 'baby-father' [intimate partner] wanted to have sex but I refused… nevertheless he fought me and I started bleeding.* – 28-year-old mother of one child, pregnant, caregiver and personal service worker

> *We separated because he drank and was very abusive – physically and verbally – and I couldn't deal with it anymore. Achieving some of the things I wanted [after the separation] was a struggle and it was very hard but God helped me through it… Domestic abuse is not a life that anybody should live, so we separated.* – 42-year-old mother of three children, caregiver and business owner

Narrative of physical and verbal abuse in parent-child relationship:

> *My son told me some hurtful words and I cried myself to sleep… [One of my sons] hit me while staying at my house…* – 72-year-old mother of seven children and subsistence farmer

Narratives of psychological abuse in intimate partner relationship:

> *I married a man that was very abusive… He went and had children outside our marriage [adultery]; he was drinking, he was gambling and a lot more and I couldn't take it so we separated.* – 72-year-old mother of seven children and subsistence farmer

> *I was living with my 'baby-father' and I was trapped. I felt imprisoned because he was insecure and possessive, not wanting me to go anywhere… My relationship didn't work because my 'baby's-father' was constantly 'cheating' and expected me to tolerate his behaviour. He would go and come as it pleased him and sometimes he would be gone for days. I had had enough so when my son was a year and a half, I thought it wasn't safe for him and asked my friend to help me move.* – 28-year-old mother of one child, pregnant, caregiver and personal service worker

Neglect: Acts of omission were particularly prominent in cases of neglect. Descriptions of acts of omission suggested failure to give due care, disregard of duty and failure to provide adequate conditions. Additionally, neglect constituted maltreatment. Most cases of neglect appeared to have occurred mainly in relationship with family members and the state. Failure of the government and family to give due care was the main manifestation of neglect. Participants in Bath and Treasure Beach self-reported the most cases of neglect.

In the context of the state, participants shared examples in which they were neglected by Members of Parliament, Jamaica Social Investment Fund (JSIF) and Rural Agricultural Development Authority (RADA) which are representatives of the Government of Jamaica.

One group complained to JSIF about receiving poor quality top soil and poor quality seedlings for their greenhouse subproject but they lamented that the agency acted indifferently to their need: *They [JSIF] didn't care about us – that's because we are poor…* Another example of neglect that appeared to be disregard of duty was in reference to RADA. A group, whose farm was affected by disease, recalled being neglected. They recalled:

> *We requested help from RADA but it took them a week before they came and inspect our produce. When the extension officer came, we were only asked to sign their book but we didn't receive the help to address our need… The extension officer came at a time that was not appropriate – while we were working in the field – they want us to work with their schedule and not with our schedule.*

In one focus group the participants explained how a Member of Parliament failed to assist, in a timely manner, with the provision of adequate conditions at their community centre. Help was requested from the Member of Parliament to repair the community centre after a natural disaster but the participants stated: *[The MP] didn't do anything… [The MP] never helped us, [the MP] just said [they] would help but never did.*

In the context of family, participants shared examples in which they experienced and observed neglect and mistreatment by mothers, fathers, children, relatives and extended family members. Several cases of elder neglect were mentioned by participants in Maggotty community. Cases of child neglect and mistreatment were recounted by few of the participants:

> *I have an adopted daughter because her dad passed away and her family doesn't take care of her… she told me 'I don't have anywhere to go because my Aunt don't treat me the way she is supposed to.' [Once] she called us in tears and told me that her Aunt boxed her"… Her mother left her with her father's mother when she was four months old and went away so she doesn't know her mom up until today.* – 57-year-old mother of eight children, caregiver and personal service worker

> *My dad lost his dad when he was three months old. His mom was mentally ill so he didn't have a stable mom and he went from home to home. First he was taken in by his uncle who half-raised him, and then another man took him and half-raised him, so my dad really had a rough childhood. My mom didn't meet her dad until she was 12 years old. So my mom grew up with a step-father.* – 42-year-old mother of three children, caregiver and business owner

A mother, in an interview, mourned about feeling neglected and mistreated by her children. She lamented:

> *… But my children don't treat me right, after all that I did for them. I struggled to take care of them. Their father died when they were young – I schooled them and now they are saying I am a wicked. It makes me feel bad but I put it to Jesus… My son told me some hurtful words and I cried myself to sleep… My daughter called – she said 'I love you' and then told others that she hated me… when she called I just started crying… [One of my sons] I heard from him about six years… [Another son] hit me while staying at my house…I last heard from him about three years ago…* – 72-year-old mother of seven children and subsistence farmer

Memories of family abuse and neglect were painfully retold by another participant:

> *It's important for me to take care of my parents because I watched my dad's family treated him really badly… I watched my uncle hit my dad in his head and all I could see was blood spewing all over the place… I watched my cousin turned over all our uniforms in the mud and there was nothing we could do about it, because we were young and couldn't fight back… We lived in a family yard, my dad's uncle gave us a house and we couldn't live in peace…* – 42-year-old mother of three children, caregiver and business owner

Failure to give due care to the elderly and provide adequate conditions for their well-being were prominent concerns expressed by participants in the Maggotty community:

> *… Elderly persons living in deplorable conditions…Another elderly man, Mr. 'Thomas' was taken to a poor house because he didn't have the means to feed himself. This is the type of poverty that we see down here. These aged persons had no family members who were willing to help them… So sometimes people can have money, but when they don't have family support it can cause physiological issues and make things worse.* – Maggotty community focus group (men)

Neglect of self, which included acts of omission and commission, was discussed mainly in individual interviews. One participant described how her brother mistreated himself by his own actions:

> *People can bring themselves down… My brother smoked a lot of ganja and that created a poor standard of living for him – now somebody has to be helping him.*

Two participants shared about neglecting their health:

> *… The mammogram I should have done it about four months ago but I didn't have the money… [This is the] second time from 2006 – I should have done it every year. [But] circumstances cause me not to be able to do it every year… It might be neglect too, yes because sometimes you neglect yourself… I have to say that because I suppose to have done it like four months ago…* – 62-year-old mother of four children, grandmother, caregiver and subsistence farmer

> *My brother became ill the January when I was feeling pain in my breast. I took my brother to the same doctor a week before I had to visit the doctor myself. And the doctor turned to me and asked: 'Were you not feeling the pain the week before?' I said, 'Yes, but I thought I could put mine on hold to make sure that my brother was ok." The doctor said to me, 'Well you are in a worst situation than your brother.'… I don't know why it is so important for me to put my family's needs above mine. I think I have such love and affection for my family, and I take care of them all the time, not just now, I*

have done it for years… – 42-year-old mother of three children, caregiver and business owner

Social exclusion: Social exclusion refers to what the participants described as disengagement and non-participation in productive activities due to difference in preferences; exclusion from community activities due to discrimination; isolation caused by embarrassment; feeling of alienation due to lack of information; as well as feelings of loneliness.

Disengagement in productive activities due to differences in preferences was the most common feature of social exclusion. It was observed by participants in Prospect and Maggotty.

Some of the diverse narratives of social exclusion are highlighted below:

Exclusion by discrimination:

I'm not feeling comfortable with them [members of the women's group]… They use to call me earlier… They no longer call me and now they choose who they want and they don't choose me. – 72-year-old mother of seven children and subsistence farmer

Isolation caused by embarrassment:

For the needy, if they are well, well in need of it [food, clothing, etc.] they will ask and the poor would do the same but they are not going to come up front like the needy… From my perspective, they feel embarrassed about their situation… – 57-year-old mother of eight children, caregiver and personal service worker

Disengagement in productive activities:

… Member thought it would have been an individual benefit… so when persons found out that it was not an individual benefit but a cooperative, persons pulled out. Because persons wanted to have their own little amount to take home… They didn't want to be a part of a group. – Prospect community focus group

Praedial larceny: Praedial larceny is the theft of agricultural produce and livestock. Praedial larceny appeared to generally result in harm and fear within a social context – mainly within the community. Praedial larceny seemed to have taken place mainly on subsistence farms. Pumpkin, pepper, plantain, cow and fish-pots were some of the agricultural products stolen.

Participants in the communities of Bath, Prospect and Treasure Beach reported experiences of praedial larceny. In general, it constrained their ability to generate income and caused fear.

Those who experienced the theft of their agricultural products no longer engaged in the production of those products, as demonstrated in the following quotes.

> *… People often steal the pumpkin, hot pepper and plantain. Praedial larceny was consistent and it discouraged us from farming. The group desires to utilise the entire property but if we plan to utilise the chicken and pig rearing facilities we would need to invest in security and have someone live on the farm because of the frequency of praedial larceny in Bath and Airy Castle communities.* – Bath community focus group
>
> *I lost a filter by the hand of theft [praedial larceny]. So it gave me a setback but then when you fall down you don't stay down. I used to raise a few cows and one morning I got up and all four of them were gone. I had planned to have six mother cows to help send the children to school and at that stage [when the praedial larceny took place] I had three – I almost reached my goal* – Prospect community focus group
>
> *… People face problems, like fishing was a big thing in Treasure Beach and now they hardly doing fishing again because when they go out there other people steal the fish pot.* – Treasure Beach community focus group

Inability to care for children: Caregiving, which involved providing for and nurturing a child or children, appeared to be a key responsibility for the participants. Caregiving was also a measure of self-evaluation, community and future well-being. The data revealed that their main concern was being unable to provide for their children, while little or no concern was expressed regarding their nurturing role. Inability to care was mainly connected to challenges of schooling their children. Factors such as being unable to provide food and clothes also weakened their obligatory caregiving responsibilities.

Inability to care for their children, mainly in the form of helping them to be educated, was the main concern for most participants. This challenge was discussed by participants in Mango Valley, Maggotty and Treasure Beach.

In Maggotty community, one mother of four children, caregiver and unemployed, lamented about her inability to care for her children: *let me tell you how I feel – in the times when I can't provide certain things for them it makes me feel miserable.*

The participants stated that some parents in Mango Valley struggled to send their children to school but after matriculation most children were unable to find a job. The participants were aware of the negative impact of this outcome on the community. They explained:

> *In Mango Valley when children leave school they don't have anywhere to go… even when they have subjects they couldn't move on, some children didn't move on because if their parents cannot help them to go to other schools then they would just sit down [at home or in the community] with nothing to do – even if they completed school with subjects.* – Mango Valley community focus group

Treasure Beach community members, in the context of describing poverty, included the difficulties of providing food and schooling in the context of caregiving:

> *I struggle a lot because I don't work and I have two children; one is… [Pause] but I'm still responsible for her because if she is hungry I still have to fret and the other one is going to school.* – 53-year-old mother of two children, caregiver and unemployed

> *…I didn't get the education that I wanted – we [my siblings and I] didn't go to school consistently because at times there was no money for us to go… I graduated from high school, but I knew there wouldn't be any college or university for me [because] my parents couldn't afford it. But one thing I know I don't want my kids to struggle like I did.* – 42-year-old mother of three children, caregiver and business owner

Lack of recognition: Recognition refers to what the participants described as respect and an act of acknowledgement of the existence of someone. The participants mainly described disrespect at the horizontal level, which is between persons within their communities and groups. Disrespect was in the form of insults, 'put down' and lack of acknowledgement. Lack of recognition was also regarded in relation to place. Some common phrases used to describe lack of recognition were – *people don't recognise you*; *they looked down on me*; and *all that I did was not counted*.

Perceptions of disregard, as a form of lack of recognition, were a major concern mainly for participants in Treasure Beach. Some participants were of the belief that they were being disregarded because of their low levels of formal education.

Other participants expressed their thoughts regarding lack of recognition from other members of the community:

I brought a friend [to church] and 'Donna' didn't welcome her – this happened three times… They don't do things the right way. She talked to everybody except my friend. They don't show me any love. – 72-year-old mother of seven children and subsistence farmer

… When people don't recognize you it makes you feel a certain way, like you don't want to be in their company – even in church sometimes the way I'm treated it makes me feel like I don't want to go and same way with the meetings. Say for example you miss a meeting this month and they are going to have a meeting next month, they don't call you and remind us about the next meeting. – 62-year-old mother of four children, grandmother, caregiver and subsistence farmer

… But if you go out on the road and you want a taxi, they say Treasure Beach, they don't count here as Treasure Beach…they don't recognize Great Bay. – 72-year-old mother of seven children and subsistence farmer

7.2.3 Psychological Dimension of Poverty

Thematic analysis of qualitative data revealed nine psychological indicators of poverty for the sample of participants. After ranking each indicator based on the number of coded sources, the order is as follows: depression, unhappiness, embarrassment and shame, anxiety and fear, mental myopia, low self-worth, laziness, discouragement and fatalism. Figure 7.4 illustrates this ranking, with the most frequent indicator (depression) having the darkest shade and the least frequent (fatalism) having the lightest shade.

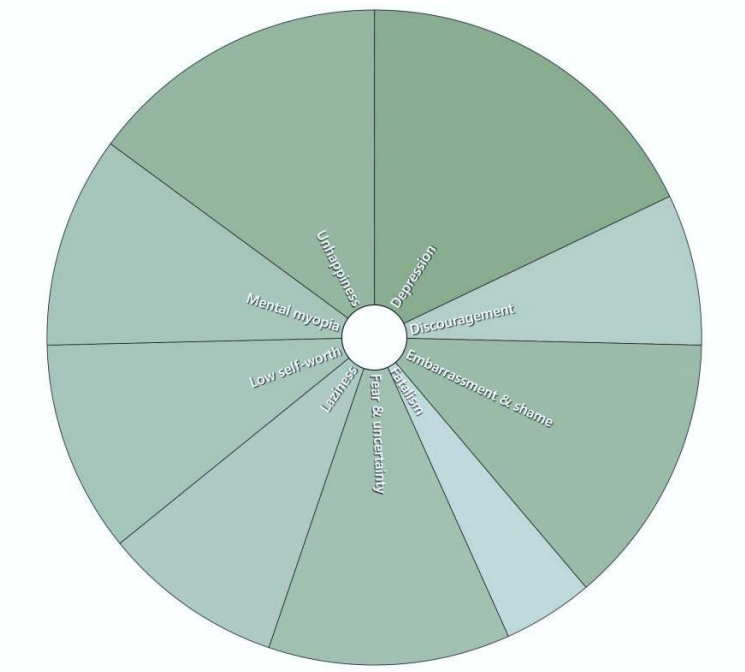


Figure 7.4 Density of psychological indicators of poverty

Depression: Depression refers to what the participants described as negative emotions over a period. They discussed feelings of hopelessness, misery, sadness, as well as feeling trapped and imprisoned. These emotions were mainly responses to other indicators of poverty. For example, negatives emotions were responses to abusive relationship, neglect, poor bodily health, insufficient job opportunity, insufficient income, inadequate housing, inadequate clothing as well as insufficient food.

Most of the negative emotions that were discussed resulted from having an abusive relationship. More expressions of hopelessness and sadness were identified in the data. Participants in all five communities expressed various negative emotions that were associated with depression. Participants in Treasure Beach expressed more feelings of depression than participants in the other communities.

Regarding hopelessness, a 62-year-old mother and grandmother, caregiver and subsistence farmer in Treasure Beach expressed feeling hopeless mainly because of poor bodily health and insufficient income to cover medical expenses. She bemoaned: *… Sometimes you can't meet your need you just feel like giving up. Yes, sometimes I feel like giving up on myself. I just have that feeling.* Another case of hopelessness was expressed by participants in the Bath community focus group in reference to participating in the REDI project:

> *It built up my hope and then dropped it down – because after getting the two greenhouses and the seeds in it we thought that, yes something will happen, and then it stops along the way – It just makes you feel like you don't even want to bother to do anything again or even come a work… Sometimes I don't worry to come because sometimes when my feet are in pain and then to walk come up here and sit down… Because I only want to come if there is something to do.* – Bath community focus group

Being miserable and angry was associated with lack of jobs and insufficient income for some of the participants in Maggotty. They stated:

> *I feel miserable… I feel angry most times… Let me tell you how I feel – In the times when I can't provide certain things for them [my children] it makes me feel miserable…* – Maggotty community focus group (women)

Sadness resulted from closure of the community skills training program in Mango Valley. This occurrence led to some community members being grief-stricken. Additionally, in Treasure Beach, one mother of seven children experienced long periods of sadness which sometimes resulted in her crying. She associated her sadness to abusive relationship with her children. Also, one participant expressed feeling trapped and imprisoned in an abusive intimate relationship: *I was living with my baby's father and I was trapped. I felt imprisoned because he was insecure and possessive – not wanting me to go anywhere.* – 28-year-old mother of one child, pregnant, caregiver and personal service worker.

One participant in Prospect reported experiencing several challenges in relation to an abusive relationship which resulted in her becoming depressed. She recalled:

> *I was a member of [a] church and I got married at 20 to an older man and this marriage broke apart… He hit me and the police locked him up… Then he started to threaten me and the children and police intervened and they advised and helped me to get out [of the house]. I took my three children and I ran… I lost my faith and became depressed…*
> – 51-year-old mother of four children, caregiver and subsistence farmer

Unhappiness: Participants discussed feelings of sadness and mourning, which were referred to as unhappiness. This unpleasant emotion was in response to the death of family members and friends as well as abusive relationships with intimate partners.

In general, observations indicated that recalling situations associated with sadness tended to evoke feelings of sadness for most of the participants. An abusive relationship was identified as the primary cause of unhappiness. Unhappiness was not discussed by most participants, except for some in Treasure Beach.

Below are quotes from two participants in Treasure Beach – the first illustrates sadness due to the loss of a family member and a close friend, and the latter illustrates current and past sadness as the participant reflects on past abusive relationships with her mother and former husband:

> *I lost two persons in my life a sister and a dearest friend to cancer within nine months of each other and so I am worst off I get a little deeper into the grieving process still and put menopause in there... So [I am] worst off emotionally but I'll get through that*

> *I am hoping it's temporary.* – 52-year-old woman, no children and rural hospitality entrepreneur

> *I finally met my mother, who was an alcoholic. She opened up and told me that I was the only child she didn't want and that I was almost born in the toilet and that she should have flushed me...[crying and sighing…ah, that pained]… Few years later I married my husband – the saddest story of my life [sigh] – abusive, abuse in the fullest form…* – 71-year-old mother of seven children and retired public servant

Embarrassment and shame: These emotional responses were mainly implicit and based on observation from other community members rather than the individual. Disapproval was the main characteristic of embarrassment and shame that was evident in the data.

Responses to perceptions of a flawed self or feeling ashamed dominated the discussions regarding embarrassment and shame. The flawed self-referred to what the participants described as being poor, illiterate and dependent. Most people who were given these identity labels were ashamed as well as angry. Participants in Treasure Beach expressed and observed more incidences of embarrassment and shame than participants in the other communities.

The data revealed that the absence of food provision for the elderly were met with disapproval and associated with embarrassment. For example, in Maggotty, some participants disapproved of neglect of the elderly and labelled it as embarrassing. They reported:

> *… These aged persons had no family who was willing to help them. Their family only want to give them a good funeral when they are dead, to save themselves from feeling of embarrassment, but they don't realise that embarrassment has already come to them, by how they allow their aged family members to live before they die. If aged, poor family members are living hungry; unable to feed themselves; and it is the community that has to feed them, this can't be good for you and your family.* – Maggotty community focus group (men)

In another case of group disapproval, study participants in Treasure Beach reported incidences of being prohibited by some members from participation in church duties. One woman recalled some incidences, and how she was embarrassed by the disapprovals:

> *[A] church sister asked me to take up offering and another said she should ask a brother; another ask me to do communion – I washed the persons feet and then I brought the water to throw away and they told me not to come up the front – they didn't tell me why. I was angry and went home right there. I don't do any duty now – I told them not to put me on any duty because they make me [feel] embarrass – three times they stopped me from doing duty – offering, communion and clean.* – 72-year-old mother of seven children and subsistence farmer

Furthermore, self-disapproval was associated with dependency, illiteracy, and being labelled as poor. In one of the cases, a participant reported incidences of mistreatment by others, which she associated to perceptions of her identity. She stated, *I feel that is [I was mistreated] because I am poor and not educated.* However, she later disapproved of these identities by declaring, *I can find a few dollars [I am not poor] and I don't have to be a bother to anybody [be dependent on others]… I'm not dunce - I can put one and one and make two…*

Participants stated that illiteracy was a source of shame that engendered mixed responses, including self-disapproval and resignation. In Treasure Beach, some adults who were identified as illiterate willingly attended adult literacy. This response suggested some levels of disapproval of their state of illiteracy. However, others who were also identified as illiterate exhibited aspects of resignation towards their state of illiteracy. One participant recalled some of their expressions that can be associated with resignation: *What is the purpose of learning since I am now an adult and have my senses? … The teacher is not more knowledgeable than I am because I can teach about some things as well.*

Being poor or being referred to as poor stimulated shame and anger for some individuals. For example, one participant described a male who was begging, as being poor, and he became angry and heaped expletives at her. On another occasion she told him that he was in need and his response was passive and accepting of her evaluation. The participant proceeded to explain that the word 'poor' has an immoral meaning and that individuals are better described as being needy. Another participant shared similar views regarding the term poverty. She exclaimed,

> *I always say the less-fortunate because it sounds so bad when you look at somebody and say that person there is really poor. I prefer to say less-fortunate as it sounds more decent.* – 42-year-old mother of three children, caregiver and business owner

After recalling and evaluating several situations regarding the poor and needy within her community, one of the participants summarised that:

> *For the needy if they are well, well in need they will ask and the poor would do the same but they are not going to come up front like the needy… Yes they hide it because they don't want anybody to know their distress and that they are poor. From my perspective, they feel embarrassed about their situation but the needy people seem as if they are not embarrassed."* – 57-year-old mother of eight children, caregiver and personal service worker

Fear and uncertainty: These two terms were described similarly by the participants. Feelings of uncertainty seemed to have produced doubt and inertia towards some activities for a few participants; while conversely, some participants willingly undertake activities in the face of uncertainties. Fear is an unpleasant emotional state consisting of psychological and psychophysiological responses to an external threat or danger, whether real or perceived (Miller-Keane 2003). Fear and uncertainty were emotional responses to insecurity but of varying strength and impact, with fear appearing to be greater. The participants expressed insecurity in relation to food, education, job and leisure.

Overall, fear and uncertainty were identified by personal and public evaluation. They were mainly associated with unemployment and under employment. Participants in Treasure Beach discussed more matters related to fear and uncertainty than participants in the other communities.

In Maggotty, fear and uncertainty were expressed in relation to unemployment and insufficient food by one of the participants. She stated:

> *… [The fact that I don't have a fixed job] makes you wonder and think if you have a meal today where tomorrow's [meal] will come from… Sometimes you sit and you cry and sometimes I have to pray… Sometimes I wonder if it is going to get worst or better.* – 42-year-old mother of four children, caregiver and seasonal personal service worker

In Prospect, varied reasons, including uncertainty, were associated with some community members being reluctant to participate in the income-generating project of

the community cooperative. One participant outlined his presumption for such feelings of fear and uncertainty:

> *… The scripture tells us that the question was asked 'can anything good come out of Nazareth?' Maybe they have started other projects… Because you know many community things started and they didn't go through to completion, and I think maybe [lack of] trust; it could be lack of confidence; it could be that persons felt that they would have managed their own resources or whatever is given to them better than if it were in a cooperative form. For some persons, I think it is lack of knowledge; lack of understanding of what the whole project was about. I think that is one of the drawbacks too why persons were not willing – because of lack of knowledge and when you don't have the full understanding.* 55-year-old father of two children, caregiver and rural entrepreneur

In Treasure Beach, a 54-year-old mother of two children, caregiver and services manager discussed several personal struggles with fear and lack of self-confidence in relation to education and leisure. She stated:

> *I was afraid to touch it [computer] because [I thought] it would blow-up on me… –* regarding computer training
> *I'm a bit sceptical of new things at first… My mind is telling me I can't and I can. But I'm still ashamed to do painting.* – regarding skills training
> *I was afraid of going on the elevator [at the hotel]… And I never felt excited because I never left my home before and it was my first time sleeping in a hotel.* – regarding new leisure activity

Another woman in Treasure Beach expressed uncertainty regarding the importance of education in securing employment:

> *Many persons talk about subjects, subjects, but even with those you still not getting a job. Having subjects does not make a difference it is common sense that works. I know a man who had no subject but common sense and he teaches electrical engineering at a school.* – 28-year-old mother of one child, pregnant, caregiver and personal service worker

Participants in the Bath community focus group expressed fear in relation to praedial larceny while outlining their desire to expand their agriculture enterprise. They stated:

> *We would like to use the entire property but if we are going to use the chicken and pig rearing facilities, then we would need to invest in security and have someone live on the farm because of the frequency of praedial larceny in Bath and Airy Castle communities…* – Bath community focus group

Mental myopia: Mental myopia or narrow-mindedness refers to what the participants described as linear thinking or one-dimensional reasoning. In some cases myopia was viewed as having fixed mind-set. Mental myopia was mainly characterised by short-term processing, instant gratification and moral ambivalence. Most myopic tendencies related to concepts of work, leisure, gender roles and responsibilities and identity.

In general, mental myopia was identified through public evaluation and less from personal evaluation. Myopic tendencies were mainly associated with concepts of work and identity. Participants in Treasure Beach observed more myopic tendencies than participants in the other communities.

Below are some of the quotes from participants which reflect myopic tendencies. For example, participants in Mango Valley had a narrow view of how to produce wine and were reluctant to use eggshells in their production:

> *SDC taught us how to make the wine with the eggshell so that it can be fermented with the eggshell but we didn't like doing it that way. It was sort of not working very well for us and even though we washed the eggshells before using them, for me personally, I couldn't bear it. So I didn't want to work with it and the other ladies didn't want to work with it either because we were thinking that eggshell is supposed to be 'raw', but actually it wasn't 'raw', it was just our thinking, it really wasn't 'raw'.* – Mango Valley community focus group

Participants in Prospect reported that a fixed mind-set about income-generation and a desire for instant gratification contributed to renouncement of membership by some cooperative members:

> *Some people just need like some ready-cash, so they thought if they put in [money] for instance today they will reap tomorrow. Their idea of the project was that the benefits would be quick. So when they found out that it's not quick, some wanted back their money and some sold their shares to others… They believed that after the start-up then they would start getting money quickly.* – Prospect community focus group

In Treasure Beach one participant lamented about the presence of moral ambivalence in the general society:

> *We [Jamaicans] have a tendency to forgive certain things depending on the amount of money that will run [receive]. We have this moral ambivalence that says 'him rich' and therefore can do anything or get away with anything or we are willing to forgive*

> *something because it is an 'uptown brown man' that did it. This moral ambivalence is 90% of our problem and how a person gets their money is important.* – 62-year-old woman, no children and rural craft entrepreneur

One participant in Treasure Beach suggested that some community members had a narrow perception of leisure:

> *So you know I am from America so girls night out, hello everybody does girls night out. Then I came here and girls are like, what do you mean – so I invited them over to my house we cooked dinner and have cocktails girls' night out. It was so unusual that their men would stand at the gate and be wondering what are they doing they didn't understand why we didn't want them around. It was such a new concept… "Just the women hanging out with each other – and it wasn't a church event or a 'nine- night', which really was the only time I would see women out or go to the local bar… If you go to the local bar you must be a 'slut' and so I would say I am just going to the bar to have a drink after work – this was a totally different concept to them.* – 52-year-old woman, no children and rural hospitality entrepreneur

Some participants in Treasure Beach alluded to some community members having a narrow perception of gender roles, responsibilities and identity:

> *Some women, whom I can understand, the mentality of them, their husband goes to work and they stay home. They think their duty is to wash, cook, clean and to look after the children and send them to school. Don't get me wrong there is nothing wrong with it but to me I think there is more to life than washing, cooking, cleaning and ironing.* – 72-year-old mother of two children and retired health worker

> *Even driving to Montego Bay, which was my job as a tour operator… Some community members would comment: 'You alone, as a woman alone doing that? Are you crazy?'… That was 1995 it was not that long ago.* – 52-year-old woman, no children and rural hospitality entrepreneur

Low self-worth: Self-worth refers to the value ascribed to an individual either by themselves or others. Low value was ascribed to some people in relation to their social class, relationship and fertility. Overall, the participants indicated that low self-worth was identified through personal and public evaluation. More cases of low self-worth were identified by personal evaluation mainly by participants in Treasure Beach.

For example, in relation to social class, members of the Bath community focus group related their low income to their status of being from the '*poorer class'*. Another example in relation to social class is about the belief of low status held by some women, which necessitate the help of a man because by themselves they are incapable

of transforming their state of poverty. This belief was rejected by participants in the Mango Valley focus group, as they state:

> *Some women feel that man is the answer, man is not the answer to take you out of poverty you can take yourself out of poverty you can own your house, you can own your own land you can own something for yourself without a man.* – Mango Valley community focus group

In Treasure Beach, one participant, a 28-year-old mother of one child, pregnant, caregiver and personal service worker, commented about having feelings of low self-worth at one point in her life because she was labelled by a family member as being barren, that is, being unable to give birth. Another participant, a 62-year-old single woman, with no children, who was a craft entrepreneur expressed that she felt a sense of low self-worth as a result of a past intimate relationship. She noted, *it affected my self-esteem and caused me to doubt myself in terms of my choices in life.*

Laziness: laziness refers to what the participants described as having the ability but disinclined to participate, especially in productive activity. Laziness was associated with expectations of and dependence on charity, as well as an aversion to job opportunities in agriculture.

Laziness was identified by participants primarily through public evaluation and not from personal evaluation. Laziness was described mainly as a contributing factor of poverty and was often associated with being dependent. Participants in Prospect discussed more matters related to laziness than participants in the other communities.

The following quotes illustrate perceptions of laziness in relation to dependence:

> *…I don't see this in the young women but especially the young men: they look [date] the white girls to chat up and get their money, they are looking the easy kind of work. I see laziness in these guys…* – 52-year-old woman, no children and rural hospitality entrepreneur

> *If you sit and wait on somebody to hand you things then you will lose out on life. I don't believe in giving a man a fish every day I would rather give him a hook and line for him to go and fish. It's a sign of laziness to sit and wait on hand-outs.* – 59-year-old father of two children and teacher

The following quotes illustrate perceptions of laziness in relation to job opportunities in the agriculture sector:

> *Simple grass-weeding and we don't have anybody to do it. Poverty is laziness and when people look on themselves as being too good to do certain work. The other day I couldn't find anybody to do the grass-weeding and yet I see them sit down on the road side. If you try to do something the poverty will change you can't sit down and fold your hand, you must do something.* – 47-year-old mother of four children, caregiver and subsistence farmer

> *… And if you call them to help to pluck the chicken they don't want to do it; and they don't want to go to anybody's pen… [They are] very lazy…* – Prospect community focus group

While some women perceived laziness as an outcome of poverty other women explained it as a contributing factor to poverty. Some participants suggested:

> *Poverty is due to laziness, because I see in Jamaica a lot of families, couples they just have children, children, children and both of them don't know where the next penny is coming from but they just have children.* – 72-year-old mother of two children and retired health worker

> *Sitting down and folding your hand and doing nothing this could bring great poverty to the island. What if my husband and I, and our neighbours, we all fold our hands then there will be poverty.* – 51-year-old mother of four children, caregiver and subsistence farmer

Another participant explained laziness as a binary concept, as both the cause and the effect of poverty. She states,

> *Laziness can contribute to poverty as well as it can be an outcome because you keep trying and then you get frustrated after a while and it makes you lazy. So it [laziness] can become poverty.* – 52-year-old woman, no children and rural hospitality entrepreneur

Discouragement: Discouragement refers to lack of motivation. It was characterised by the participants as demotivation, broken trust, and shattered hope, hostility from neighbours, burdensome bureaucracy and unmerited efforts. These manifestations of discouragement were connected to abusive relationships in the contexts of praedial larceny and neighbours, neglect from political representatives as well as burdensome bureaucracy.

Participants identified discouragement through personal evaluation. Participants in Bath, Prospect and Treasure Beach reported diverse cases of discouragement. Most of the participants associated their discouragement with representatives of the government.

For example, in Prospect, some participants were discouraged by years of neglect from political representatives. One 55-year-old father of two children, caregiver and rural agriculture entrepreneur expressed:

> *We voted them in with the hope that they would help us with water, light and road. We put our hope and trust in them and they broke it… These are some of the things that keep down the poor.*

In Treasure Beach, participants stated that they were discouraged by hostility from neighbours and others were dismayed by the burdensome bureaucracy in doing business with government agencies. In the latter case, one participant bemoaned:

> *If the Jamaican Government could 'pear-down' on the bureaucracy and make it easier for people…, then there would be a lot more people paying taxes and a lot more people would be above board in what they are doing. But they make it so cumbersome for folks and so difficult it's no wonder why people don't bother go there… I have been fighting this fight forever.* – 52-year-old woman, no children and rural hospitality entrepreneur

In the Bath community, discouragement resulted from praedial larceny, which is an indicator of abusive relationship. Members of the Bath community focus group complained about experiencing consistent praedial larceny on the farm, which negatively affected their motivation. The women reflected … *Praedial larceny breaks our drive [motivation]… Because after planting and nurturing your produce on the farm and then when you're ready to reap somebody else reaps your produce before you.*

Fatalism: Fatalism refers to what the participants described as some level of acceptance of unfavourable state of being. Other descriptions included associating personal situation to imprisonment. One participant assigned people to two groups – those who were fortunate and those who were unfortunate, based on the belief that that is the structure of life:

> *The less fortunate part for me is that some people are more blessed than some. You might be more blessed than me because your parents can afford certain things and my parents can't. So I see it as a part of life, that is how life is made up, some of us are going to be fortunate and some, not so fortunate.* – 42-year-old mother of three children, caregiver and business owner

Fatalism was mainly associated with limited job opportunities and lack of income. Fatalism was not discussed by most participants except a few in Prospect and Treasure Beach.

7.2.4 Physical Dimension of Poverty

Thematic analysis of qualitative data revealed four physical indicators of poverty. After ranking each indicator based on the number of sources, the order is as follows – starting with the most frequent indicator and ending with the least: low levels of formal education, poor bodily health, lack of participation in productive activities, and limited skills set. Figure 7.5 illustrates this ranking, with the most frequent indicator (low levels of formal education) having the darkest shade and the least frequent (limited skills set) having the lightest shade.

Figure 7.5 Density of physical indicators of poverty

Low levels of formal education: Low levels of formal education refers to what the participants described as knowledge and skills acquired which were below the secondary level of education and included lack of schooling. Participants associated low levels of formal education with limited general understanding, inability to attend tertiary institutions, exiting secondary school without being successful in the matriculation exams and low or lack of school attendance.

Low levels of formal education were most often discussed in the form of lack of school attendance, which was mainly caused by insufficient income. Participants in Treasure Beach contributed significantly to the discussion regarding low levels of formal education.

Their description of low levels of formal education also included the impact of this limitation. Many participants believed that lack of access to formal education reduces the level of formal education that an individual can acquire, increases illiteracy and reduces access to economic opportunities. Participants also stated that low levels of education were associated with feelings of shame and contributed to negative self-identity and poverty: *Lack of education can contribute to your poverty…* One of the participants in Treasure Beach admitted that her lack of education was nothing to be proud of:

> *I don't think I have anything else to be proud of because I didn't get an education – After I left primary school at age 15 I didn't go back to another school. So I just read and write, well I can't read very well and I don't write so pretty.* – 62-year-old mother of four children, grandmother, caregiver and subsistence farmer

Lack of school attendance appeared to be one of the visible signs of poverty, as observed and expressed by one of the participants in Treasure Beach:

> *There is a family in Billy's Bay – they are having it [life] very hard; they hardly can send their children to school… They are really and truly in need because their children can't even go to school – you can see that they are poor.* – 57-year-old mother of eight children, caregiver and personal service worker

Participants noted that low levels of formal education were caused by lack of money and obligations to caregiving responsibilities, as stated in Box 7.6 by a participant in Treasure Beach. There were some suggestions that genetic disorders such as dyslexia played a role in the low level of literacy in Treasure Beach. One participant believed that formal education might have been irrelevant to the main productive activity in Treasure Beach community, which was fishing.

Box 7.6 Shame and caregiving responsibility hindered access to education

> *Adult literacy class started at Sandy Bank School but some members of the community were ashamed to attend. Many of them are illiterate because first time children would be taken out of school to work and help to care for their other siblings.*
>
> **Narrator: 47-year-old mother of two, caregiver and manager**

One participant in Maggotty lamented about the opportunities missed due to low level of formal education. She stated:

> *My biggest challenge right now is not being able to read and write. If I could read and write like you I would achieve something – It might be that in those days I would have setup myself better… My mother was very poor so she couldn't afford to school me, so you know when you don't have someone to send you to school you're going to drop out of plenty things.* – 67-year-old mother of 11 children, grandmother, caregiver and subsistence farmer

Poor bodily health: Poor bodily health referred to what the participants described as impeded physiological functions and activities. Participants self-reported cases of Chikungunya Virus, hypertension and arthritis as the most common factors that

impeded their physical functions and activities. Other forms of ill-health mentioned were slipped disc, high cholesterol, migraine, sinusitis, dyslexia, anaemia, and breast cancer. Their poor bodily health affected the use of their hands, ability to walk, read, write, their reproductive functions as well as caregiving roles and responsibilities.

More participants commented on hypertension and its debilitating effects on their bodies than other forms of ill-health. In general, poor bodily health reduced their income and constrained their ability to work. Relatively most of the self-reported cases of poor bodily health came from participants in Treasure Beach.

In describing these debilitating health factors, most participants referred to how they hindered their ability to care for themselves and family as well as hindered their participation in productive activities. One participant in in Prospect stated,

> *I have a hand with arthritis in the bone so I can't wake up early, so sometime I can't do much of my farming, as a result I have to pay someone and so I lose that money.* – 47-year-old mother of four children, caregiver and subsistence farmer

Concerns regarding poor bodily health were widespread across Treasure Beach and a few cases in Maggotty and Prospect communities. In Maggotty, several concerns were expressed about the challenges encountered by elderly members of the community. Two grandmothers in Treasure Beach explained their health challenges:

> *… Because right now my cholesterol is high and I have high blood pressure… Because of sickness I have to spend what I have because I do a lot of tests… I do the blood test like three times for the year because of the cholesterol.* – 62-year-old mother of four children, grandmother, caregiver and subsistence farmer

> *… I would like to have a job that I can manage… I'm getting up in age – I'm not young again and I have pressure [hypertension]… I feel like I could do something that is not too long.* – Treasure Beach community focus group

Another participant in Treasure Beach reported how being anaemic was a threat to her baby:

> *When I was four months pregnant… I was too weak and kept blocking out every second because I was anaemic from not eating properly… The doctor said that I could lose the baby because I was not eating properly.* – 28-year-old mother of one child, pregnant, caregiver and personal service worker

Lack of participation in productive activity: Participation in productive activity refers to what the participants described as conscious engagement of labour in available activities specifically for the purposes of getting economic returns. This indicator refers to available job opportunities and is different from insufficient job opportunity.

Engagement in productive activities was expected to help individuals to earn an income. These productive activities were mainly related to agriculture as well as work in general. However, the participants expressed numerous factors that hindered participation in productive activities. Laziness and belief about ways of being and doing were the most common factors discussed by the participants as impediments to participation in productive activities. Most of the available productive activities were in agriculture. Lack of participation in available productive activities was a major concern for participants in Treasure Beach and Prospect.

References to laziness were generally in the form of public rather than personal evaluation. In the Prospect focus group, a common view amongst participants, when asked why some community members didn't participate in the subproject, was that they were lazy, as highlighted in Box 7.7. Another participant noted that, *the other day [recently] I couldn't find anybody to do the grass-weeding and yet I see them sit down on the road side.*

Box 7.7 Participants believed laziness inhibited participation in jobs

… Some of them are lazy… Sometimes you have to look at it two ways, sometimes the person is lazy and they look down on things [some jobs]. Because I usually go over to the pig pen and help, but some of them wouldn't do that…

Narrators: Prospect community focus group

Regarding beliefs about ways of being and doing, in one case, a participant in Treasure Beach noted that strict adherence to some beliefs about gender roles limited participation in productive activity for some women. She commented:

> *Some women, whom I can understand, the mentality of them, their husband goes to work [and] they stay home. They think their duty is to wash, cook, clean and to look after the children and send them to school… There is more to life than that – go out and work and*

earn your own money, open a little bank account… – 72-year-old mother of two children and retired health worker

Also, beliefs about ways of doing certain activities seemed to reduce participation in productive activities. Furthermore, factors such as unmet expectations, self-doubt, past experiences of failed community initiatives, religious commitments, and poor bodily health also negatively affected participation in available productive activity. For example, poor bodily health had debilitating effect on productive activity for one participant in Treasure Beach:

Five years ago I was strong I was more able but sometimes right now I can't move because I have arthritis, so I can't really move. The arthritis causes swelling so I have a walking stick… So that prevent me from working and I cannot walk long distance. – 62-year-old mother of four children, grandmother, caregiver and subsistence farmer

Limited skills set: This refers to what the participants described in cases where community members lack the required skills set to participate in their desired productive activities. Limited skills set was discussed in two key contexts – in performing productive activities and in reference to desired career. Participants noted that community members often have basic knowledge but inadequate technical skills and specialised knowledge about their desired career or productive activities.

Most of the discussions about limited skills set referred to available productive activities in the agriculture sector. Comments from the participants suggested that limited skills set was related to lack of training or education, as well as laziness and various beliefs about ways of doing and being. Participants in the Mango Valley community self-reported most of the situations related to limited skills set. The following quotes illustrate cases of limited skills set.

We didn't know how to do them [jams and jellies] because to be honest making a guava jelly, we didn't know the difference between jelly and the jam… Even now you have individuals who call the whole thing jam because they don't know the difference between the jelly and the jam. – Mango Valley community focus group

SDC taught me to make my first speech about thanking somebody… [At first] I said I couldn't do it and I cried; I said 'no I'm not going to do it'… – Mango Valley community focus group

… So even if they come [completed school] with subjects, because they weren't trained and there wasn't any training available in the community… Even though the tourist resort area

is just 15 minutes ride away from us, because persons weren't trained they couldn't work in the hotels… – Mango Valley community focus group

Once you don't have education or a skill you can't specialise… Some of them want office work and cannot do it. – 47-year-old mother of four children, care-giver and subsistence farmer

One participant connected limited skills set with unwillingness to do some types of work:

> *What I notice with a lot of unfortunate people is that they don't want to work. A lot of them don't want to work and if they do work, it's like you can do a gardener job, that is the qualification you have, and yet you want to do a front office work. I find that a lot of people who are struggling to make a living don't want to settle for something less until better comes.* – 42-year-old mother of three children, care-giver and business owner

7.3 Summary of poverty from the perspectives of rural women

The sample of participants generally used personal experience, including emotional experience as well as observation of others as frames of reference in their description of poverty. Qualitative data gathered from the participants revealed poverty as a multidimensional phenomenon, categorised by four dimensions and 29 indicators. This poverty consisted of material, social, psychological and physical dimensions.

Overall, the qualitative data indicated that the material dimension of poverty was the most common aspect of their deprivation. Analysis of the data revealed that material poverty was experienced and observed predominantly as insufficient income, unemployment and under employment as well as insufficient food. The indicator of material poverty that was least experienced by the participants appeared to have been the inability to pay bills. Analysis of the data further suggested that participants in all five communities self-reported experiences of material poverty. Participants in the Prospect community reported relatively the least incidences of material poverty. Participants in the Maggotty community focus group self-reported relatively more experiences of material poverty.

For the social dimension of poverty, analysis of the data suggested that dependence, abusive relationship and neglect were the most common indicators. Lack of recognition seemed to have been one of the indicators that was least identified by the participants.

Data analysis indicated that depression, unhappiness along with embarrassment and shame were the most common indicators of psychological dimension of poverty, and conversely, fatalism was identified by relatively a small number of participants.

Regarding the physical dimension of poverty, low levels of formal education and poor bodily health were the dominant indicators, while low skills set was hardly identified by the sample of participants.

Together these results provide insights into the multiple forms of poverty that have debilitated the well-being of the sample of rural women. The findings in this section indicate that the nature of poverty in rural Jamaica appears to be broader and more intense than what it was generally perceived to be. The next section, provides greater detail of the characteristics of the nature of poverty, from the perspectives of the sample of rural participants in this study.

7.4 Section B: Coupling of poverty

In the previous section of the findings, definitions of four dimensions and 29 indicators of poverty based on the point of view of the participants were revealed from the data analysis. Taken together, these findings suggested that the poverty experienced by the participants might have been broader than previously perceived. Additionally, the findings indicated associations between the dimensions and among the indicators but required further analysis to explore those connections.

This section documents key results from an in-depth analysis of those connections. Presented here are two-way relationships which emerged from detailed content analysis of the self-reported connections within and across dimensions and indicators of poverty. Knowledge of those unique relationships was useful in providing a broader informational base for the evaluation of the REDI project, which is in the following section. Emergent from these findings concerning the nature of poverty are insights that contributed to the explanation of some of the conversion difficulties faced by the sample of rural women, in pursuit of their valuable freedoms and the quality of life they had reasons to value. The valuable freedoms and desired quality of life of the sample of rural women are presented in the final section of this chapter.

Findings discussed here relate to the second research question, which sought to identify the relationships between material, physical, social and psychological dimensions of poverty. These relationships appeared to be dynamic and distinctive to the poverty experienced and observed in data gathered from the sample of rural women.

Knowledge of connections between poverty indicators is central to the application of the capability paradigm, being applied here, for five key reasons. First, they contribute to the identification of valuable ends and means in the lives of the poor, which is one of the primary objectives of the capability paradigm. Second, an understanding of the coupling of deprivations is a pathway to uncovering systemic barriers that are germane to some fundamental freedoms of the poor. Third, these connections provide foundational understanding about the structure and characteristics of poverty. Fourth, one of the characteristics of poverty, its intensity, can be articulated through the linkages. Fifth, knowledge of these unique relationships may help to broaden the informational base for evaluating antipoverty policies and programs (Sen 1999; 1993). The last three rationales have been articulated in the findings presented here.

Relationship nodes were created as the relationships were identified. Linguistic connectors in the narratives of the participants such as, *because*, *since*, *as a result*, *if*, *and*, *then*, *instead of*, *rather than*, *before*, *after*, and *next*, were the main criteria used in identifying these relationships (Ryan and Bernard 2003). In the presentation these linguistic connectors are underlined for added emphasis. Only two-way relationships were captured and presented with the use of NVivo 10 and 11. Correlational, conditional and association were the three main types of relationship identified. In the following section, these relationships are presented, using figures and charts with supporting text explanations. First is the presentation of the relationships between material and other indicators of poverty, followed by relationships with physical indicators, then social indicators. The section concludes with the relationships associated with the psychological indicators and a summary of all the relationships.

7.4.1 Relationships between material and other indicators of poverty

Insufficient income: Detailed content analysis revealed that insufficient income was connected to 20 indicators and was the most connected indicator across all dimensions of poverty. Overall, in the dataset, insufficient income was predominantly linked to unemployment and underemployment. Analysis revealed that it generally had strong connections with poor bodily health, underutilised and insufficient resource, low levels of formal education and dependence. These connections compounded the problem of insufficient income.

Figure 7.6 illustrates some directional relationships related to the nature of insufficient income. The phrase '*leads to*' denote key directional relationships. The top left quadrant in Figure 7.6 shows that unemployment and underemployment, poor bodily health, abusive relationship and praedial larceny led to insufficient income. These relationships suggested that those indicators were components in the structure of insufficient income.

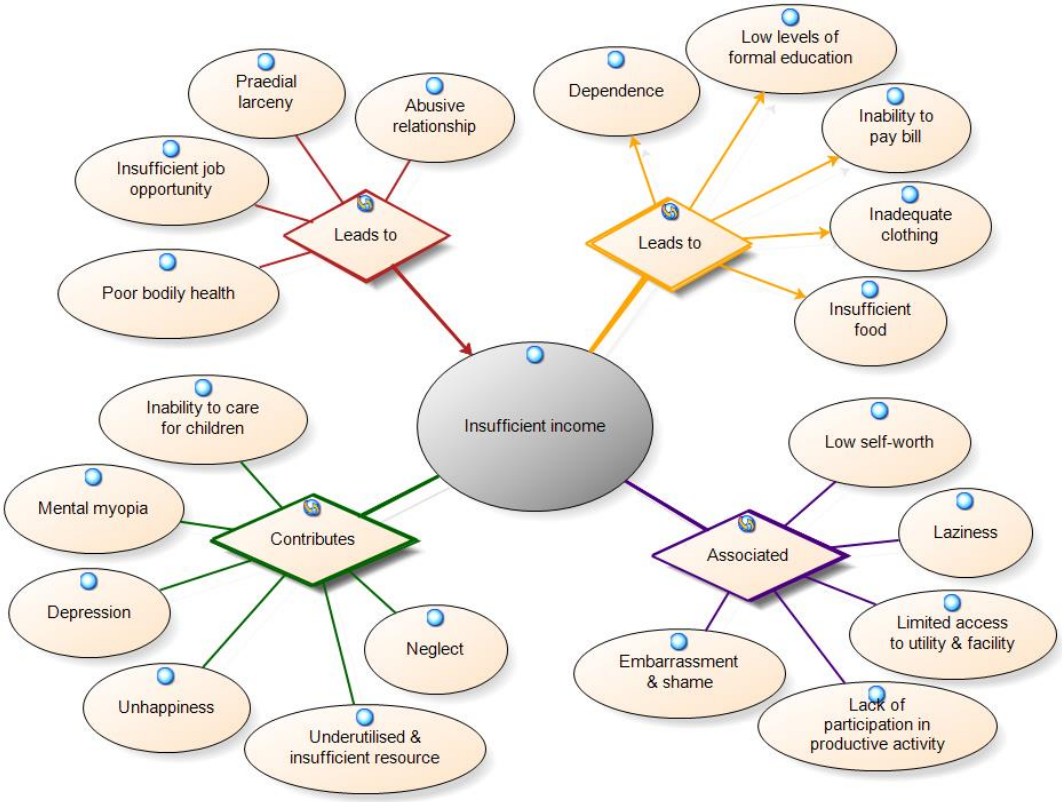


Figure 7.6 Insufficient income and relationships with other indicators of poverty

The following quotes illustrate the positive correlation between insufficient income and abusive relationship as well as between insufficient income, unemployment and underemployment. Also, they exemplify how abusive relationship, unemployment and underemployment compounded insufficient income. In one of the cases, a participant recalled her personal experience of how an abusive relationship and unemployment worsened insufficient income:

> *We separated because he drank [alcohol] and was very physically and verbally abusive and I couldn't deal with it anymore… And then I had to go off on my own, and that was when the struggle began again: I was out of a job and I had to live and make life for myself, and this used up a lot of my savings.* – 42-year-old mother of three children, caregiver and business owner

In this case participants in the Bath community explained the role of unemployment and underemployment in their experiences of insufficient income:

> *… The farm was not producing enough to sustain the members and as a result some chose to move on for better – some migrated, started poultry rearing, others were dependent on their husbands. Most of those who left the farm did so because of the discontinuation of the stipend – we no longer receive a 'regular salary'. Those who left moved on with their lives… Most of us continue even though we do not earn a consistent income from the farm because we don't have any other source of income or support.* – Bath community focus group

In the top right quadrant of Figure 7.6 it shows that insufficient income caused dependence, low levels of formal education, inability to pay bills, inadequate clothing and insufficient food. These relationships indicated that insufficient income aggravated other indicators of poverty. For example, a grandmother in Treasure Beach who was unemployed also had poor bodily health and depended on her son. She stated that sometimes she was unable to pay for critical medical procedures. Another participant indicated that the severity of insufficient income affected her ability to pay an electricity bill:

> *… And it is the end of the month now and my light bill is due on Thursday the 3rd, and I don't have the money to pay for it as yet…* – 42-year-old mother of five children, caregiver and self-employed

Indicators that appeared to have had contributory and associated relationships with insufficient income, as shown in Figure 7.6, may also have had a role in the nature of insufficient income, albeit possibly to a lesser degree.

Unemployment and underemployment: This indicator was the second most interconnected material indicator, with linkages to 19 indicators across all four dimensions. Data analysis revealed that unemployment and underemployment were predominantly associated with insufficient income. The data also shows that there was generally a strong connection between unemployment and underemployment and low levels of education, dependence, limited access to utility and facility, as well as underutilised and inadequate resource.

Figure 7.7 illustrates that unemployment and underemployment led to dependence, discouragement, inability to pay bills, insufficient income, inadequate clothing and fatalism. These relationships indicated the severity of unemployment and underemployment. For example, a 42-year-old mother of five children who was self-employed stated that not having a job also meant that her inability to care for her children was exacerbated:

> *I need a good job, so I can better help my family… So I can give them whatever they want. Because sometime they want like… Last month they wanted a pair of shoes and now the school told me that my daughter's uniform is short – if I had a job I would be able to buy a brand new uniform for her…*

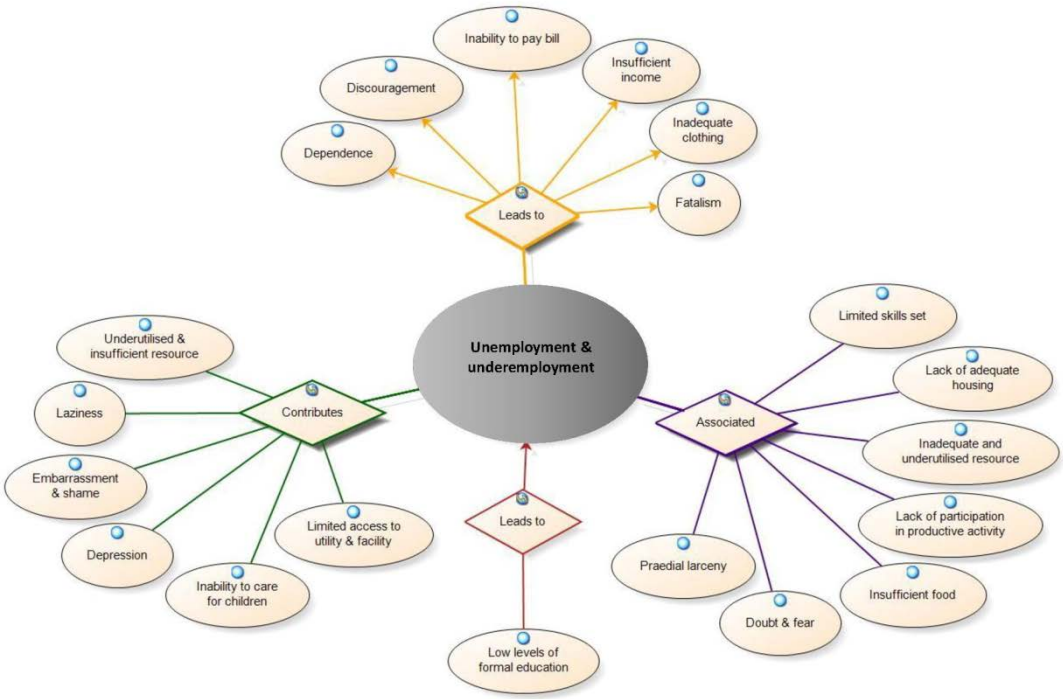


Figure 7.7 Unemployment and underemployment and relationships with other indicators of poverty

Data analysis also revealed, as shown in Figure 7.7, that low levels of formal education were some of the main factors that led to unemployment and underemployment. This relationship might have been significant to the nature of unemployment and underemployment.

Conversely, the analysis uncovered that even after addressing what some believed to be the main causes of unemployment and underemployment, namely low levels of formal education, most youth were still unable to find jobs. For example, in Treasure Beach, one participant related feelings of discouragement and fatalism pertaining to youth with educational qualifications that were unable to find employment. She stated:

> *I feel bad sometimes because despite your qualifications it is still difficult to get a job which makes you feel underqualified and de-motivated. I wish the government would do more for young people. You go to school and get all the subjects but at the end of the day you still cannot get any job. So I wish the government would get more jobs for young people. I have four subjects but I feel like I had wasted my time at school. My cousin has ten subjects at grade one, CAPE and went to college but she is at home [without a job] and things like that make me feel discouraged. Even now my sister is going back to school… to*

waste her time again. – 28-year-old mother of one child, pregnant and personal service worker

Similarly, participants in Maggotty and Mango Valley reported several cases of educated youth being unemployed, which some associated with underutilised resource. They stated:

> *In Mango Valley, when people leave school they don't have anywhere to go, especially if they didn't get a proper education. But even when they have subjects [secondary level graduate] they couldn't move on [to a job or higher education], some people just didn't move on.* – Mango Valley community focus group

> *The main challenge that affects the people in this community [Maggotty] is the lack of job opportunities. We have the Maggotty High School and the Glen Stewart Primary School. The young people leave school and they have no jobs to take up. Parents spend money sending their children to school and at the end many of them who didn't get an opportunity to go to university are sitting at home. Many of them also take jobs of which they are over-qualified, such as working in a wholesale packing bags etc. This is less than worthwhile after you spend hundreds of dollars sending them to school. There is no facility here that can even employ half of the youth leaving school.* – Maggotty community focus group (men)

The positive correlations illustrated above, between unemployment and underemployment and discouragement, dependence and underutilised resource have complicated the structure of unemployment and underemployment. Additionally, the reporting of multiple cases suggested that the absence of employment opportunity for youth was a common feature of most communities.

Indicators that had contributory and associated relationships with unemployment and underemployment, as shown in Figure 7.7 above, have also contributed to the characteristics of unemployment and underemployment, but not significantly.

Insufficient food: This indicator was connected to 12 indicators across all four dimensions of poverty. Overall, the dataset revealed that participants predominantly linked insufficient food with dependence. Insufficient food was also strongly associated with poor bodily health, depression, inadequate clothing, inadequate housing and abusive relationship. These connections suggested that insufficient food was influenced by several indicators.

Data analysis revealed key indicators that influenced insufficient food, which are identified by the connector *'leads to'*, as shown in Figure 7.8. The top quadrant of Figure 7.8 illustrates that insufficient food led to poor bodily health, dependence, as well as embarrassment and shame. These relationships confirmed the role of insufficient food in exacerbating other indicators of poverty, as exemplified in the following three cases:

Case1: insufficient food, poor bodily health and dependence:

> *When I was four months pregnant, one morning a lady who worked next door [came to visit me]… I was too weak and kept blacking out every second because I was anaemic from not eating properly… She went to the store and bought me some food which I prepared and ate… I almost lost the baby twice – the first time was at six months and the second time at eight months. The doctor said that I could lose the baby because I was not eating properly.* – 28-year-old mother of one child, pregnant and seasonal personal service worker

Case 2: Insufficient food and dependence:

> *… A man came by because he was hungry and I gave him a full plate of food… My mother was just like that – she would give a lot to people.* – 47-year-old mother of two children and office manager

Case 3: Insufficient food, dependence and embarrassment:

> *… But they don't realise that embarrassment has already come to them by how they allow their aged family members to live before they die. If aged, poor family members are living hungry unable to feed themselves and it is the community that has to feed them, this can't be good for you and your family.* – Maggotty community focus group (men)

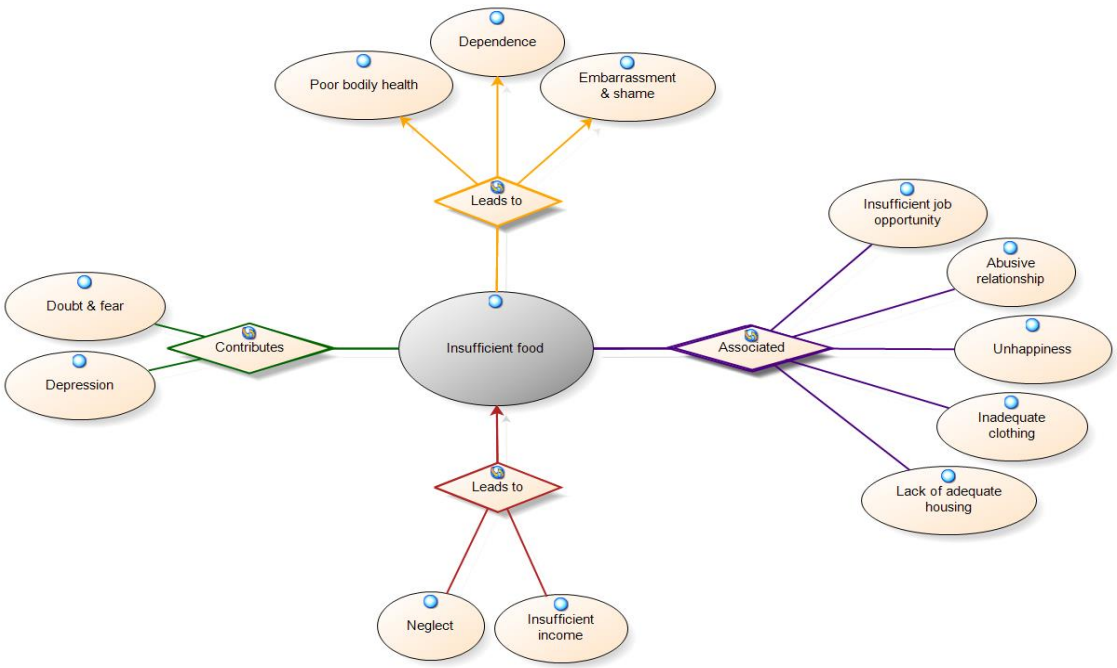


Figure 7.8 Insufficient food and relationships with other indicators of poverty

Neglect and insufficient income led to insufficient food, as shown in the bottom quadrant of Figure 7.8. These relationships contributed to the composition of insufficient food. In one of the cases, for example, a participant in Maggotty stated that lack of income resulted in her being unable to purchase food: *Sometimes I need things and I don't have the money to buy it… Say supposed I want a pound of flour – I don't have the money to buy it…*

Furthermore, indicators that had contributory and associated relationships with insufficient food, as illustrated in Figure 7.8, also had a role in the nature of insufficient food.

Limited access to utility and facility: This indicator was connected to 12 indicators across all four dimensions of poverty. Overall, exploration of the dataset uncovered a strong connection between limited access to utility and facility and inability to pay bills, unemployment, underemployment, low levels of formal education and dependence. These linkages suggested that limited access to utility and facility underpinned several forms of poverty as experienced by the participants.

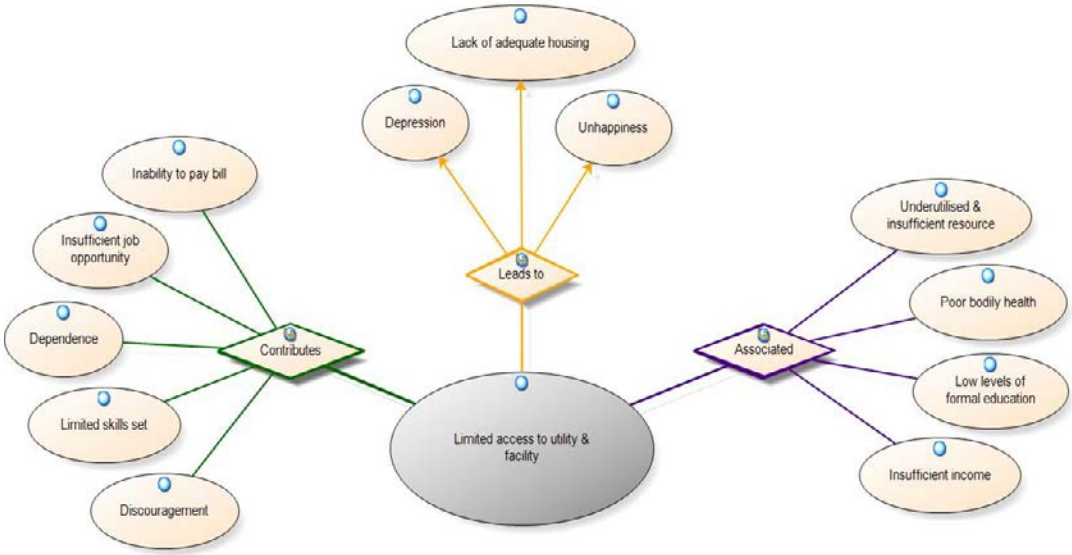


Figure 7.9 Limited access to utility and facility and relationships with other indicators of poverty

Indicators with relationships that *'leads to'* and *'contributes'* to limited access to utility and facility, as shown in Figure 7.9, illustrate how these indicators of poverty reinforced each other.

Data analysis revealed that limited access to utility and facility caused inadequate housing, as well as what appeared to be depression and unhappiness. For example, closure of the community centre in Mango Valley, which was used as a skills training facility, resulted in expressions of sadness and distress. Members of the Mango Valley community group lamented:

> *… It pains my heart when I looked at all the books (I don't even like to remember it) that came from Food for the Poor… When I looked at the books in the rubbish – heaped and burnt and some of them wet… It grieves my heart, I don't like to talk about it… The people [community members] quarreled about it day and night. I feel bad, really bad, it's [closure of the community centre] like a family that is dead and especially the books are like my children and my good community friends…* – Mango Valley community focus group

Furthermore, it was uncovered that limited access to utility and facility was composed mainly by inability to pay bills, unemployment, underemployment, dependence, limited skills set and discouragement. For example, limited access to water was contributed by non-payment of bills, high costs of water and lack of access to domestic water, as reported by three of the participants:

My water got cut off because I cannot pay the water bill; the bill was high and they cut it off. – 53-year-old mother of two children, caregiver and unemployed

The other day they put on some new meters, and as it spins it [price of water] goes sky-high so we cannot get the water to do the farming again so that cause more poverty again. The bills are too high! – 52-year-old mother of three children, caregiver and unemployed

We don't even have running water… We have running water but not like the domestic water, it's the irrigation [water] for the farmers that's what we use. We are still having it hard. – 43-year-old mother of three children and subsistence farmer

Indicators that appeared to have associated relationship with limited access to utility and facility, as illustrated in Figure 7.9, also had a role in the characteristic of limited access to utility and facility.

Inadequate housing: This indicator was connected to nine indicators across all four dimensions of poverty. Overall, exploration of the dataset revealed that inadequate housing had a role in dependence, insufficient food, poor bodily health, limited access to utility and facility as well as unemployment and underemployment. Figure 7.10 illustrates that inadequate housing led to dependence, which compounded the poverty experienced by the participants. For example, from the dataset, it was identified that participants with inadequate housing relied on neighbours for access to sanitary facilities.

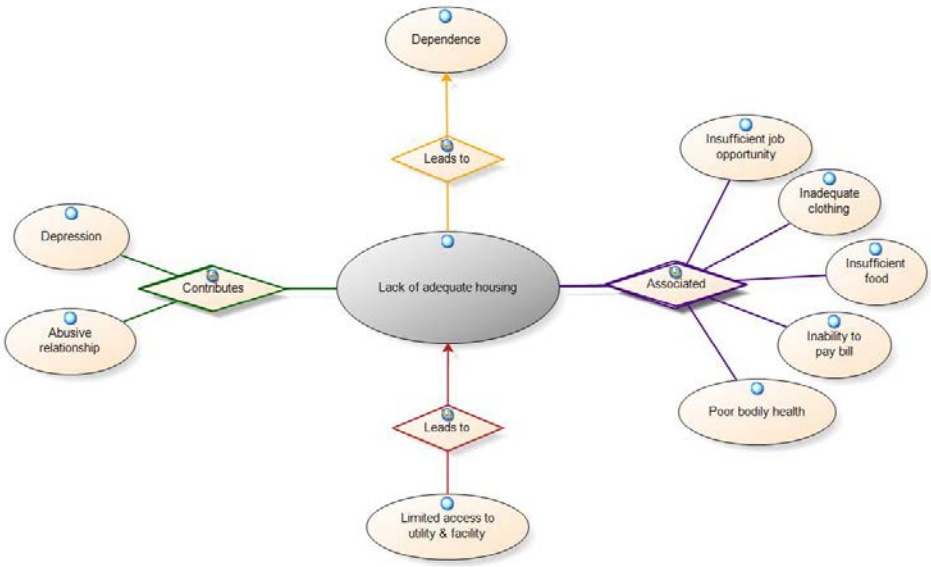


Figure 7.10 Lack of adequate housing and relationships with other indicators of poverty

Furthermore, in the bottom quadrant of Figure 7.10 it shows that limited access to utility and facility caused inadequate housing, with limited access to water as the main factor. Some participants without appropriate water supply systems at home appeared to have used unhygienic water storage systems as coping strategies. For example, one participant stated:

> *I don't have to pay any water bill – I have a drum, even though it is not the black drum but I have a drum and jugs so when it rain I fill them up and I can also collect water from the pipe [public standpipe].* – 42-year-old mother of five children, caregiver and self-employed

Members of the Mango Valley focus group described a complex conditional and associated relationship between lack of adequate housing, insufficient food, inadequate clothing and depression. In this relationship poverty consisted of inadequate housing, inadequate clothing and lack of food. This combination of deprivation contributed to depression and abusive relationship. The women stated:

> *They [community members] want a good house, they don't have clothes, and food – the essential things they don't have… and it stresses them out and it break out in violence on the road. But their poverty shows in other ways… They don't know how to talk to people… And they don't know how to deal with it [poverty].* – Mango Valley community focus group

Furthermore, indicators that had other contributory and associated relationship with inadequate housing, as illustrated in Figure 7.10, also have had a role in the intensity and structure of inadequate housing, but to a lesser degree.

Underutilised and insufficient resource: This indicator was connected to six indicators across three dimensions of poverty. Overall, exploration of the data uncovered that underutilised and insufficient resource was strongly associated with unemployment, underemployment and insufficient income. These relationships suggested that underutilised and insufficient resource derived from many factors.

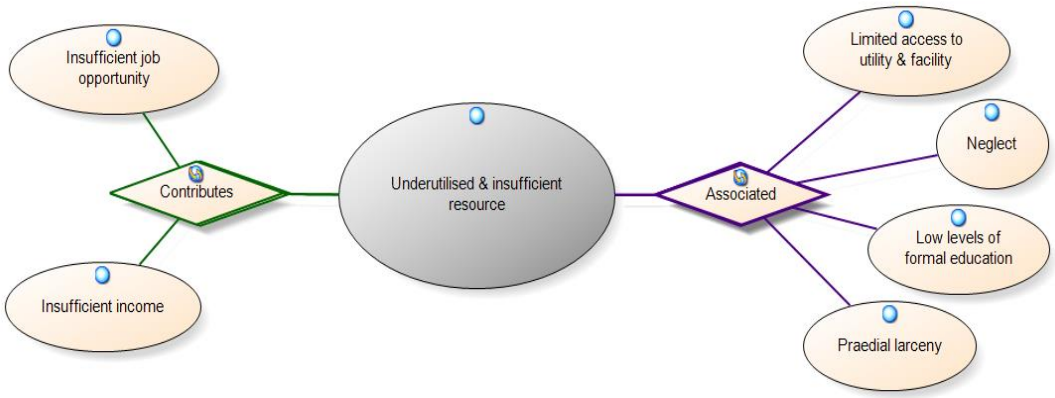


Figure 7.11 Underutilised and insufficient resource and relationships with other indicators of poverty

Figure 7.11 illustrates that unemployment, underemployment and insufficient income contributed to underutilised and insufficient resource. For example, in Bath able-bodied women bemoaned not being able to work and when they did work most times they did so without an income; and a majority of the large 30-acre farm property leased by the group was underutilised. They stated:

> *We the members are working without pay with the hope that our effort might produce something that could make our lives better or develop the project to achieve its former success… We are currently paying lease for this entire 30 acres of farm property, which has chicken and pig rearing facilities, but we haven't been able to fully use all of the property…* – Bath community focus group

Furthermore, data analysis indicated that neglect, low levels of formal education, praedial larceny, limited access to utility and facility were all associated to underutilised and insufficient resource. For instance, in Maggotty some participants described underutilised farm land and fruits in relation to lack of access to markets and wasted human resource. The participants observed:

> *We have space for factories and a very fertile environment here. If you look, you can see that we have mangoes, papayas, breadfruit and otheite apples that go to waste because we have no markets for them. If we had a factory here with a good cold storage we would do well because when there is a glut on the market all we would do is store the excess produce and we would have [products] when the drought comes; instead of 60% of what we produce going to waste. This also severely affects the farmers, because if they invest $100,000 in planting tomatoes and pumpkin and only get back $10,000 at the end of it, this creates a problem because $90,000 is lost plus their labour. The return is*

> *low and not worthwhile, so next year the farmers are risk-averse and are not planting as they don't want to lose what they don't have.* – Maggotty community focus group (men)

Similarly, in Mango Valley, members of the focus group discussed women and youth being unemployed alongside wastage of fruits in the community. Additionally, some participants in Bath and Maggotty associated underutilised and insufficient resource with neglect from the government. For example, members of the Bath focus group recalled a situation regarding plant disease infestation. They noted:

> *We requested help from RADA but it took them a week before they came and inspect our farm. When RADA [an extension officer] came we only signed a book but they didn't help to address our need.* – Bath community focus group

Inadequate clothing: This indicator was connected to ten indicators of poverty over three dimensions. Overall, data from the participants show a strong linkage between inadequate clothing and insufficient food, insufficient income, neglect, social exclusion, unemployment and underemployment. These connections suggested that multiple factors influenced inadequate clothing for the sample of rural women.

Indicators with relationships that *'leads to'*, *'competes'* and *'contributes'* to inadequate clothing, as shown in Figure 7.12, identify key factors that helped to structure inadequate clothing.

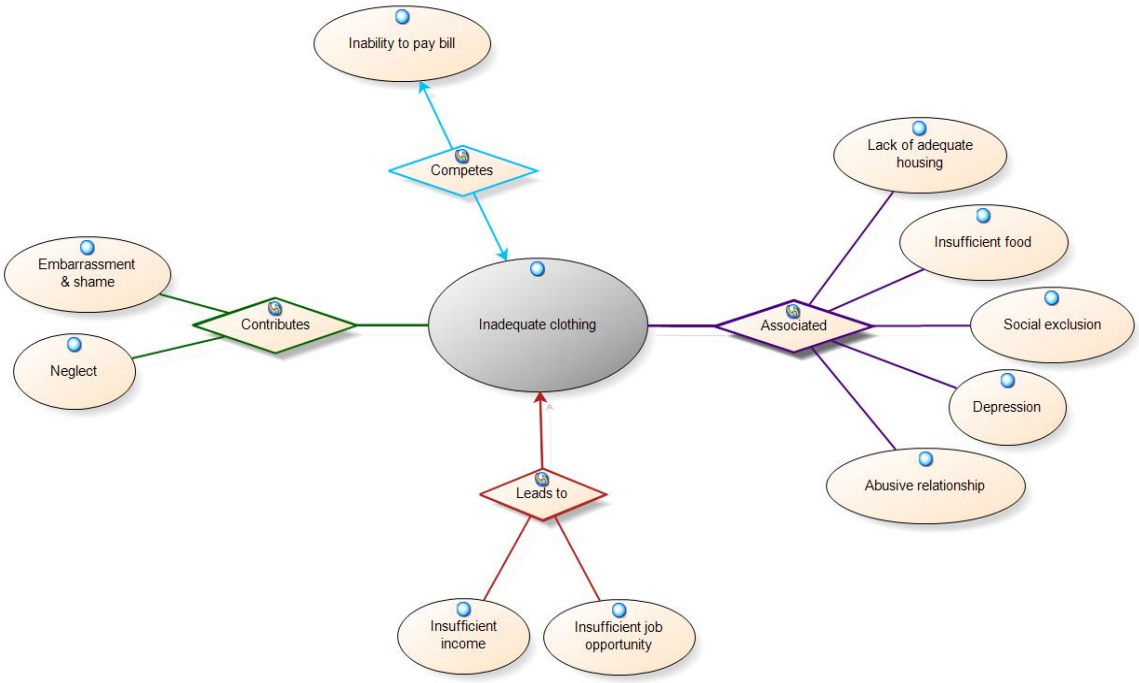


Figure 7.12 Inadequate clothing and relationship with other indicators of poverty

Data analysis indicated that insufficient income, unemployment and underemployment led to inadequate clothing, as illustrated in Figure 7.12. These relationships revealed how indicators of poverty intensified each other in the lives of the participants. The role of insufficient income in worsening inadequate clothing is exemplified in the following quote:

> *I remember when I only had one pair of shoes… And I had to put 'cardboard' in my shoes –so my children didn't have to go without I did without [shoes] so that they could have. I remember going to the shop to buy shoes for myself but remembered that my two children needed 'this and they need that' – I left the shoes and bought what they need and did without.* – 71-year-old mother of two children and retired healthcare worker

Additionally, the analysis uncovered the contributory role of inadequate clothing in embarrassment and shame, as well as how the need to address inadequate clothing competed with the need to pay utility bills. Participants explained how sometimes when they lacked the sufficient income needed to buy clothes and uniform for their children and pay bills, they have to make a choice between both expenditures.

Participants gave examples in which they observed the poor lacking food and clothing simultaneously. For example, in explaining the situation of poverty for some community members in Treasure Beach, one participant stated:

> *There is an office by the plaza where 'Mr. Brown' hands out items to the poor. There you can really see the needy people. They turn up for the food, they turn up for shoes and they turn up for clothes… Overall in Treasure Beach you have a lot of needy people some can't even build a home. We [Treasure Beach Women's Group] give to the poor we also have lots of 'shut ins' [poor elderly community members] and we give them gifts every December. We go around to houses as far as Billings Bay, Bluntas, Great Bay we do all of that. We provide rice, flour, sugar, cornmeal, bath soap, tissue, bath rags, and other grocery items. They really and truly appreciate what we do.* – 57-year-old mother of eight children, caregiver and personal service worker

Inability to pay bills: This indicator was linked to six indicators across two dimensions. Overall, analysis of the data connected inability to pay bills mainly to limited access to utility and facility as well as insufficient income.

Indicators with relationships that *'leads to'* and *'competes'* with inability to pay bills, as shown in Figure 7.13, were key factors in defining the structure of inability to pay bills.

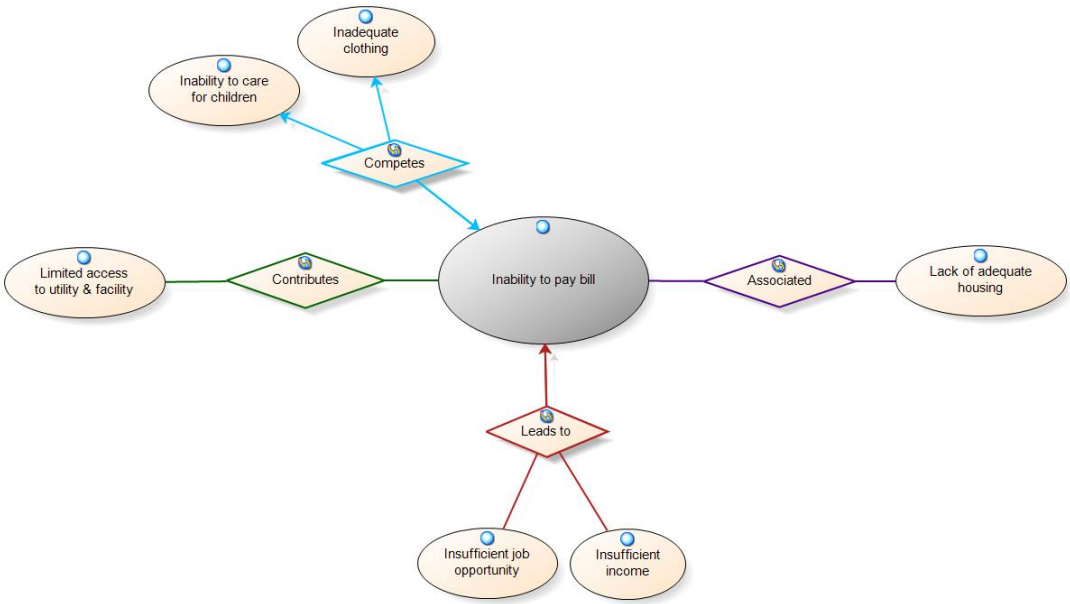


Figure 7.13 Inability to pay bills and relationships with other indicators of poverty

Analysis uncovered tensions between inability to pay bills, inability to care for children and inadequate clothing, as shown in Figure 7.13. This competing relationship illuminates how various forms of poverty constrained others. Participants noted that sometimes when they lacked sufficient income they had to choose between caring for their children and paying bills, as one participant – 52-year-old mother of 3 children, caregiver & unemployed – declared: *We don't get enough finances to pay bills and send children to school.*

Data from the participants also indicated that insufficient income, unemployment and underemployment led to inability to pay bills, as illustrated in Figure 7.13. These relationships compounded the structure of inability to pay bills.

Furthermore, indicators that had contributory and associated relationship with inability to pay bills, as illustrated in Figure 7.13, also had a role in defining the structure of inability to pay bills.

In summary, eight material indicators of poverty were identified in the narratives of the sample of participants. A tapestry of multidimensional poverty was revealed through the relationships between the indicators. The relationships illuminated how different forms of poverty compounded and aggravated other indicators across the boundaries of several dimensions.

Overall, insufficient income, unemployment and underemployment, insufficient food and limited access to utility and facility appeared as the four main material indicators of poverty which deprived the sample of rural women from enjoying their desired quality of life. Their material poverty was so far-reaching that it exacerbated dependence, embarrassment and shame and low levels of formal education. The strongest relationships in their material poverty seemed to be those structured by unemployment and underemployment and insufficient income.

7.4.2 Relationships between social and other indicators of poverty

Dependence: All four dimensions of poverty had connections with dependence. In general, analysis of the qualitative dataset uncovered a strong link between dependence and inadequate housing, dependence, neglect, insufficient food, unemployment and underemployment.

Key relationships regarding the nature of dependence are denoted by the connector *'leads to'* in Figure 7.14. The top right quadrant in Figure 7.14 illustrates that dependence led to discouragement. This relationship indicated how social poverty can aggravate psychological poverty. The top left quadrant shows that dependence was reinforced by multiple forms of deprivation – namely, neglect, inadequate housing, insufficient income, insufficient food, unemployment and underemployment. These relationships shed light on the formation of dependence in the lives of the participants. For example, the following quotes exemplify the role of insufficient food in the development of dependence. One individual stated *[someone who has] no food and depend on people to feed them…* and another commented *For example, Maas John who don't have anything and you give him $100 dollars to buy a tin of mackerel and a pound of flour…*

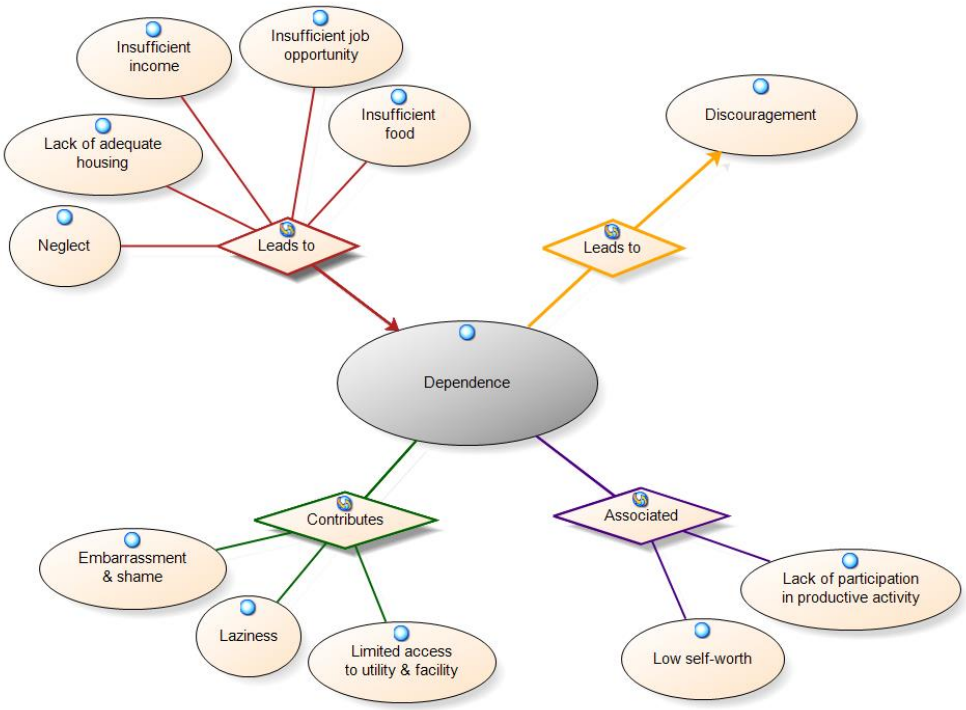


Figure 7.14 Dependence and relationships with other indicators of poverty

Contributory and associated relationship with other indicators, as illustrated in Figure 7.14, also had a role in the formation of dependence.

Abusive relationship: This indicator was connected to 11 indicators across all four dimensions of poverty. Analysis of the dataset revealed that generally participants predominantly associated abusive relationship with what appeared to be depression, abusive relationship, unhappiness, poor bodily health and praedial larceny.

From the data in Figure 7.15, it is apparent that abusive relationship led to depression, unhappiness, low self-worth, discouragement, poor bodily health and insufficient income. The most interesting aspect of these relationships is the fact that these indicators that represent poverty in the psychological, physical and material dimensions were all exacerbated by abusive relationship, which is a form of social poverty.

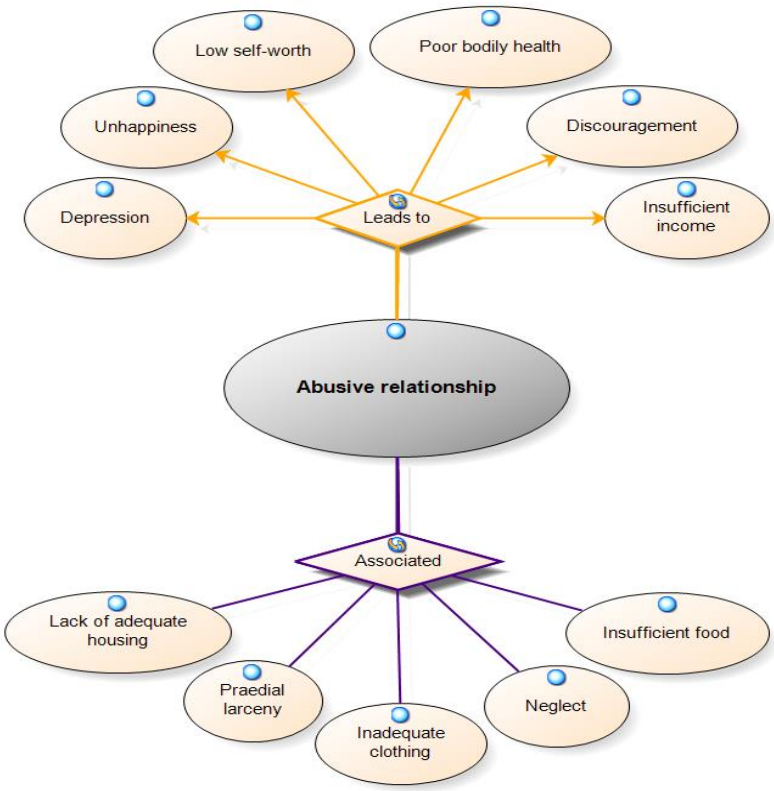


Figure 7.15 Abusive relationship and relationships with other indicators of poverty

The following examples further illustrate the intensity of abusive relationship in cases of poor bodily health. What is striking about this relationship is that some instances of poor bodily health resulted only from abusive relationships, mainly with intimate partners. Two of these cases are as follow:

> Case 1: *At 21 years-old I became pregnant for my long-time boyfriend but we separated before the child was born… Few years later I married my husband – the saddest story of my life [sigh] – abusive, abuse in the fullest form, abuse after abuse, physical abuse… At one stage I almost lost a child because he [my husband] had kicked me so badly… He would hit me in the eye and burn me… I ran away with my children but he found me and broke my knee…* – 72-year-old mother of seven children and retired public servant

> Case 2: *At eight months [of pregnancy] 'Mark' wanted to have sex but I refused because by this time I despised him, nevertheless he fought me and I started bleeding. I went to the hospital and they said that the baby was coming and it had a 50% chance of living. I cried and asked God why me. I was in the hospital for two weeks…* – 28-year-old mother of one child, pregnant and seasonal service worker

From the data, it was uncovered that depression was the main indicator that positively correlated with abusive relationships, both intimate-partner and parent-child

relationships. For example, in the intimate-partner relationship, two participants retold the situations which led to their feeling of depression:

> *I got married at 20 years-old to an older man and this broke apart – He hit me and the police locked him up and then he started to threaten myself and the children and the police intervened and they advised and helped me to get out. I took 'my' 3 children and I ran… Because of that I lost my faith and was depressed…* – 51-year-old mother of four children, caregiver and subsistence farmer

> *… I was living with my baby-father and I was trapped. I felt imprisoned because he was insecure and possessive – not wanting me to go anywhere… All I did was pray, sleep and cry.* – 28-year-old mother of one child, pregnant and seasonal service worker

In the parent-child relationship one mother lamented:

> *My son told me some hurtful words and I cry myself to sleep… My daughter called to say happy birthday – she told me that she loves me and then went and tell other people that she hates me and when she called I just started crying… I went through a lot of tribulation…* – 72-year-old mother of seven children and subsistence farmer

Neglect: Exploration of the dataset uncovered neglect was connected to eight indicators across all four dimensions. Through further data analysis neglect was frequently identified with dependence, abusive relationship, depression as well as underutilised and insufficient resource.

Key directional relationships that emerged from the analysis are denoted by the connector '*leads to*', as shown in Figure 7.16. What stands out in Figure 7.16 is that neglect not only led to other social poverty (dependence and social exclusion) but it also intensified psychological poverty (depression) and material poverty (insufficient food).

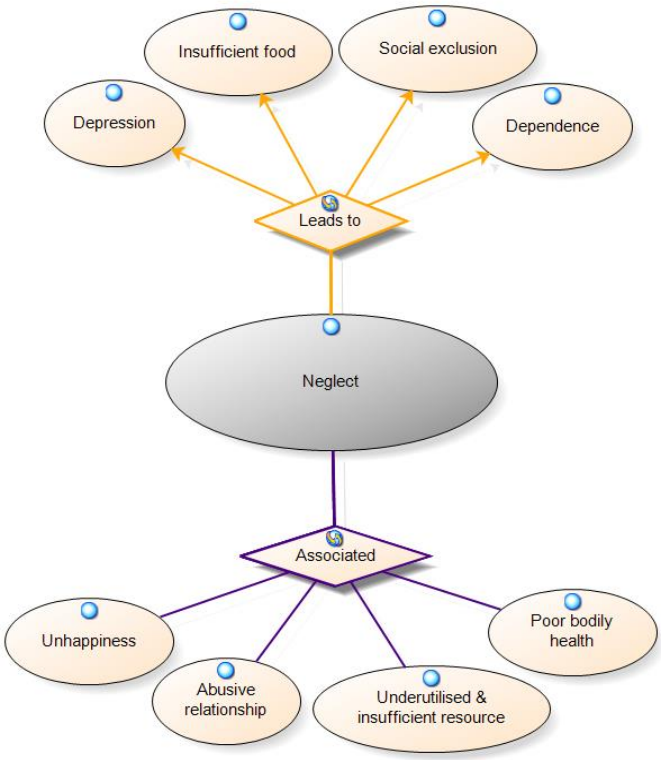


Figure 7.16 Neglect and relationships with other indicators of poverty

These positive correlations illuminate the role of neglect in compounding other indicators of poverty. The following quote exemplified how neglect resulted in dependence:

> *I have an adopted daughter because her dad passed away and her family didn't take care of her… She was living with her aunt but she didn't treat her right… Her mother left her with her grandmother when she was four months old and went away – she doesn't know her mom – up until today she doesn't know her mom.* – 57-year-old mother of eight children, caregiver and personal service worker

Participants in Maggotty observed how neglect induced depression. They noted:

> *Sometimes people can have money, but when they don't have family support it can cause psychological issues and make things worse. This has caused vibrant hardworking people to just give up on life, to stop working and taking care of themselves. We have a real life example of this in our community...* – Maggotty community focus group (men)

Additionally, data for the relationships associated with neglect had a role in the composition of neglect, but to a lesser degree.

Social exclusion: Connections to social exclusion and seven indicators across three dimensions were identified while exploring the dataset. Analysis of the data revealed strong connections between social exclusion and inadequate clothing, lack of

participation in productive activity as well as embarrassment and shame. Those connections, for the sample of rural women, indicated that social exclusion was underpinned by several factors.

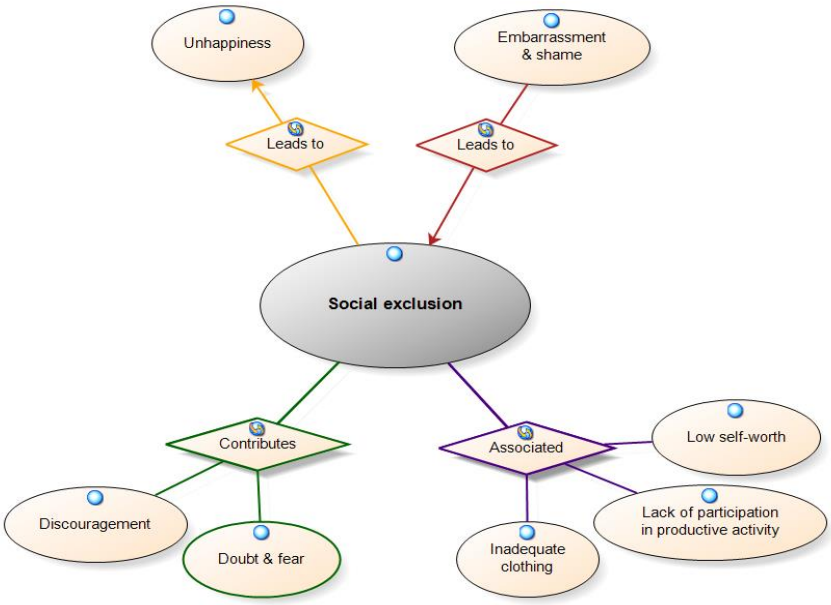


Figure 7.17 Social exclusion and relationships with other indicators of poverty

Key indicators that underpinned social exclusion which emerged from the data analysis were denoted by the connectors *'leads to'* and *'contributes'*, as shown in Figure 7.17. It is apparent from Figure 7.17 that embarrassment and shame led to social exclusion; while social exclusion led to unhappiness. These relationships indicated that psychological poverty (embarrassment, shame and unhappiness) was both the cause and effect of social poverty (social exclusion). Additionally, the bottom left quadrant of Figure 7.17 shows that social exclusion contributed to other psychological indicators of poverty (discouragement, uncertainty and fear).

These following situations further illustrated the structure of social exclusion. Social exclusion, in the form of what appeared to be a coping strategy in cases of embarrassment and shame, recurred throughout the interviews. In one case, a 72-year-old mother of seven was embarrassed and saddened because according to her, church-members gossiped about the death and burial of one of her sons. Her response to the situation was, as she said, *I didn't go to church for seven weeks.*

Additionally, another participant while explaining the difference between the poor and the needy stated that the poor generally excluded themselves from social gathering because they were embarrassed about their condition. She explained:

> *For the needy, if they are well, well in need they will ask and the poor would do the same but they [the poor] are not going to come up front [in social gathering] like the needy… Yes they hide it because they don't want anybody to know their distress and that they are poor. From my perspective, they feel embarrassed about their situation.* – 57-year-old mother of eight children, caregiver and personal service worker

Praedial larceny: Exploration of the dataset uncovered that praedial larceny was connected to five indicators across three dimensions of poverty. In the dataset, general comments about praedial larceny were mainly associated with abusive relationship. Upon closer examination of the data, significant relationships between praedial larceny and other indicators were identified and denoted with the connector *'leads to'*, as shown in Figure 7.18. It was identified that praedial larceny led to discouragement and insufficient income.

The following quote exemplifies the far-reaching effects of praedial larceny in the lives of poor subsistence farmers. Participants in the Bath community said they were discouraged because of praedial larceny:

> *People often steal the pumpkin, hot pepper and plantain. Praedial larceny was consistent and it discourages us from farming, especially the planting of pumpkin and plantain, because when you put in the effort and plant them and when you expect to reap them someone else reaps them before you do…* – Bath community focus group

Additionally, participants in Prospect made direct connection between paedial larceny and insufficient income:

> *I lost a filter by the hand of thieves [praedial larceny]. So it gave me a [financial] setback… I used to raise a few cows and one morning I got up and all four of them were gone…* – Prospect community focus group

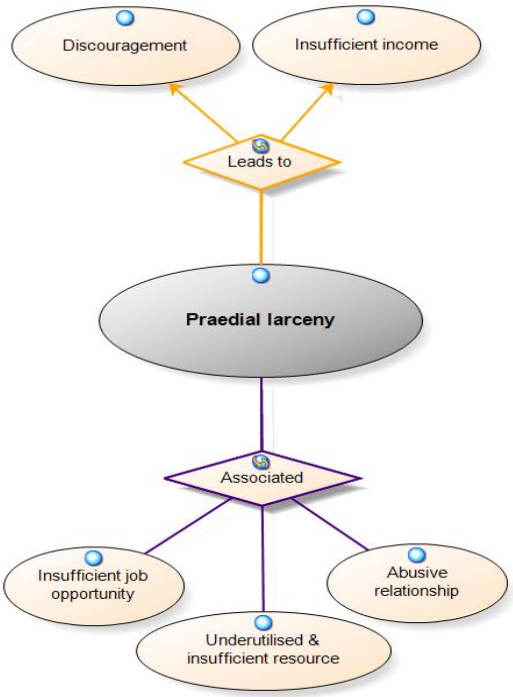


Figure 7.18 Praedial larceny and relationships with other indicators of poverty

The associated relationships between praedial larceny and other indicators, as shown in Figure 7.18, also influenced the nature of praedial larceny.

Inability to care for children: Five indicators across three dimensions were connected to this indicator. Overall, data analysis revealed that insufficient income, unemployment and underemployment contributed to the inability of the participants to care for their children, as shown in Figure 7.19. Conversely, inability to care for children contributed to low levels of formal education and what appeared to be depression.

Another significant relationship uncovered during data analysis was that inability to care for children competed with inability to pay bills mainly because of limited income. These dynamic relationships revealed that the root cause of inability to care for children was material poverty. These connections further exposed how material poverty (insufficient income, unemployment and underemployment) mediated through social poverty (inability to care for children) and influenced psychological poverty (depression). For example, commenting on the challenges she was experiencing in caring for her children, one of the participants in the Maggotty

community focus group said, *let me tell you how I feel: the times when I can't provide certain things for them [her children] it makes me feel miserable.*

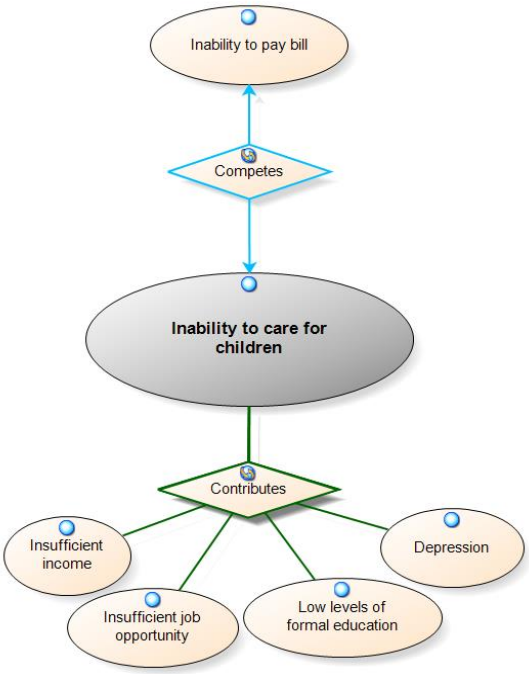


Figure 7.19 Inability to care for children and relationships with other indicators of poverty

Lack of recognition: Figure 7.20 illustrates that this indicator was connected to three indicators across three dimensions. In general, analysis of the data uncovered a close connection between lack of recognition and social exclusion. The most significant relationship revealed through the analysis was that lack of recognition was caused by low levels of formal education. This relationship suggested that a person with low levels of formal education is more likely to experience disrespect and less likely to receive commendations from others. For example, in one case a participant thought that she was disregarded because of her low level of education, she stated, *sometimes they say I am one of the founders [inventors] of the group but they look down on me because I am not educated* – 72-year-old mother of seven children and subsistence farmer.

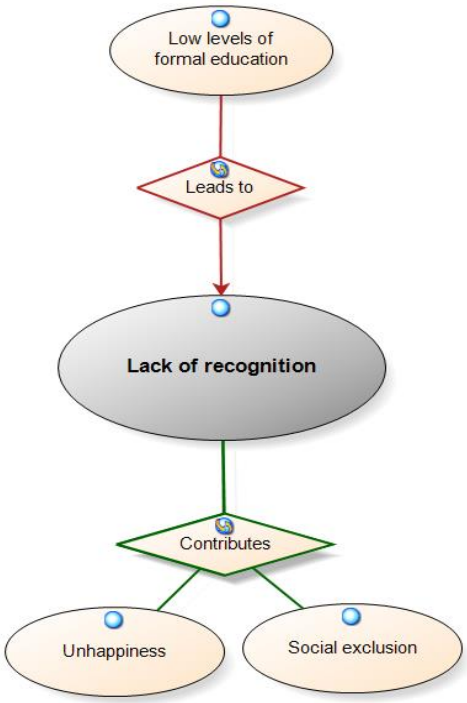


Figure 7.20 Lack of recognition and relationships with other indicators of poverty

Analysis of the dataset revealed that in some cases lack of recognition contributed to unhappiness and social exclusion. For example, one participant alluded to feeling unhappy because of lack of recognition. She said:

> *When people don't recognize you it makes you feel uncomfortable, like you don't want to be in their company. Even in church, sometimes the way they treat me I feel like I don't want to go and I have the same feeling about going to the meetings.* – 62-year-old mother of four children, caregiver and subsistence farmer

Another participant recalled several instances of lack of recognition in the context of social exclusion:

> *… During the beach-cleaning they didn't mention Great Bay – is it that there are no beaches in Great Bay? … [The women's group] They asked five people to volunteer to do delivery – I put down my name but 'Sandra' went and did the delivery – they didn't call me and they did it twice… I used to deliver the Christmas gifts and they don't involve me anymore. They exclude me from participating in activities and they don't call me. I was put down for hospitality [volunteering] – but 'Ava' said I live too far.* – 72-year-old mother of seven children and subsistence farmer

Seven social indicators of poverty were identified from the narratives of the sample of participants. A tapestry of poverty was revealed, with intensity that generally extends

beyond the borders of several dimensions. In general, the structure of the social indicators was mainly influenced by unemployment and underemployment, neglect and insufficient income. The intensity of their social poverty was so far-reaching that it seemed to have had a significant role in depression, unhappiness and discouragement. The strongest relationships in their social poverty appeared to be those structured by neglect and abusive relationship.

7.4.3 Relationships between psychological and other indicators of poverty

Depression: Exploration of the dataset disclosed connections between depression and 12 indicators across all four dimensions of poverty. Overall, depression was associated mainly with abusive relationship, insufficient food, unhappiness and neglect. These linkages indicated that depression was underpinned by multiple factors.

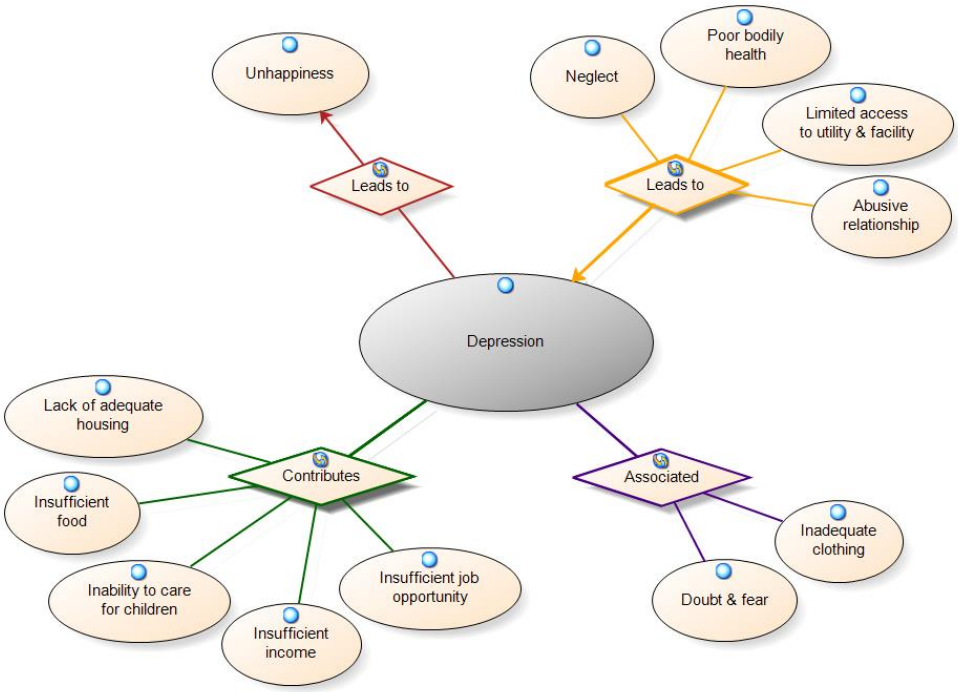


Figure 7.21 Depression and relationships with other indicators of poverty

More in-depth analysis of the dataset identified significant relationships related to depression. These relationships are denoted by the connector *'leads to'*, as shown in Figure 7.21. The top right quadrant of Figure 7.21 illustrates that depression was caused by neglect, poor bodily health, abusive relationship, as well as limited access to utility and facility. Those correlations indicate the direct influence of social, material

and physical poverty on psychological poverty. The top left hand quadrant shows that depression caused feelings of unhappiness.

Contributory and associated relationships uncovered between depression and other indicators, as shown in Figure 7.21, also aggravated feelings of depression.

Unhappiness: All four dimensions of poverty were intertwined with unhappiness. In general, data analysis disclosed that unhappiness was predominantly associated with abusive relationship. During the analysis, relationships central to the root cause of unhappiness were identified by the connector *'leads to'*, as shown in Figure 7.22. From the figure, it can be seen that social, material and other psychological indicators of poverty led to unhappiness.

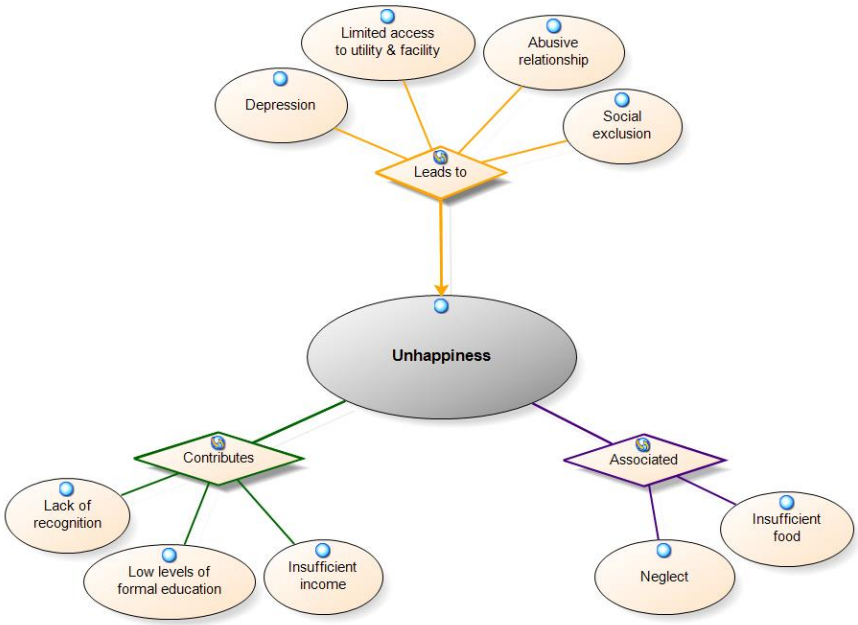


Figure 7.22 Unhappiness and relationships with other indicators of poverty

These correlations indicated root causes of unhappiness was diverse for the sample of participants. The following quote illustrated how abusive relationship resulted in unhappiness for one participant. She reported,

> *My children don't treat me right after all that I did for them… My son told me some hurtful words and I cry myself to sleep… My daughter … told people that she hates me and when she called and I just started crying…* – 72-year-old mother of seven children, subsistence farmer

Contributory and associated relationships between unhappiness and several indicators, as shown in Figure 7.22, also contributed to experiences of unhappiness in the lives of the research participants.

Embarrassment and shame: Eight indicators across all four dimensions of poverty were linked to embarrassment and shame. Analysis of the data revealed that embarrassment and shame were predominantly associated with lack of participation in a productive activity. Further analysis identified relationships, denoted by the connector '*leads to*' in Figure 7.23, that were central to the nature of embarrassment and shame. In the left quadrant of Figure 7.23, embarrassment and shame led to social exclusion. This correlation helped to explain how psychological poverty exacerbated social poverty. For example, in one case a participant expressed her response of anger and social exclusion as a result of an embarrassing situation, she explained:

> *One of my church-sisters asked me to take up the offering and another said she should have asked a brother; another asked me to do communion – I washed the persons feet and then I brought the water to throw away and they told me not to come up to the front – they didn't tell me why. I became angry and went home at that same time. I don't do any duty now – I told them not to put me on any duty because they made me feel embarrassed.* – 72-year-old mother of seven children and subsistence farmer

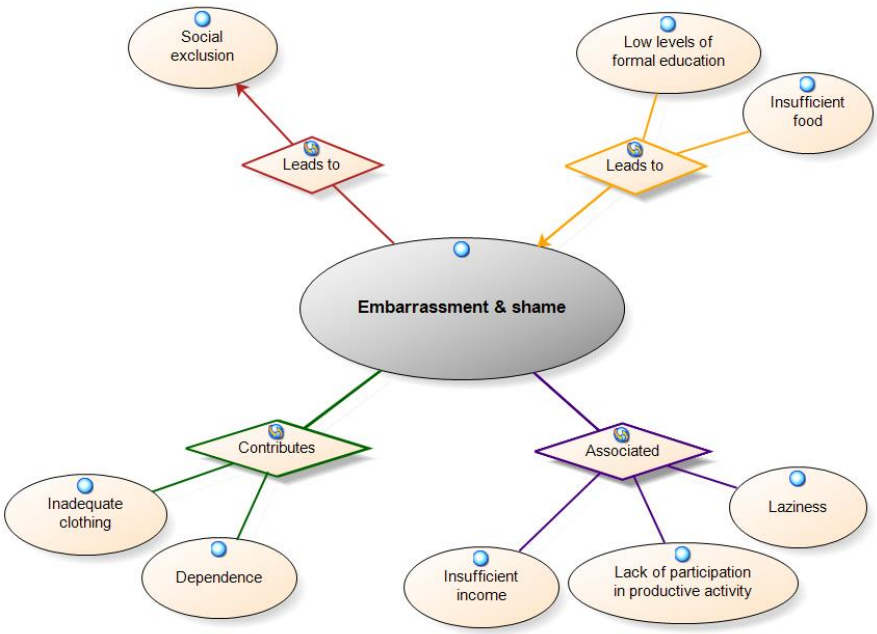


Figure 7.23 Embarrassment and shame and relationships with other indicators of poverty

The right top quadrant of Figure 7.23 illustrates that insufficient food and low levels of formal education led to embarrassment and shame. These connections suggest that embarrassment and shame were directly influenced by physical and material poverty.

Embarrassment and shame also had contributory and associated relationships with other indicators, as shown in Figure 7.23, which had a role in the nature of embarrassment and shame.

Fear and uncertainty: All four dimensions of poverty had linkages with fear and uncertainty. Overall, fear and uncertainty were predominantly associated with lack of participation in productive activity and mental myopia. Detailed content analysis of the data uncovered some relationships which were significant to the nature of fear and uncertainty. In Figure 7.24 those relationships were denoted by the connector *'contributes'*. The data in Figure 7.24, represent fear and uncertainty as contributing factors to lack of participation in productive activity and social exclusion; whereas mental myopia and insufficient food contributed to fear and uncertainty.

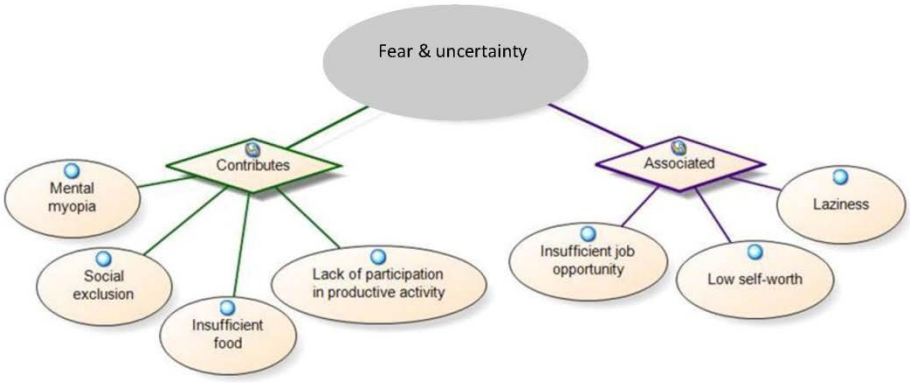


Figure 7.24 Fear and uncertainty and relationships with other indicators of poverty

The following quote exemplifies the relationship between fear, uncertainty and lack of participation in productive activity. Members of the Prospect community focus group suggested that fear and uncertainty had a role in the withdrawal and non-participation of some community members in the REDI project. They stated:

> *For some persons, I think too is lack of knowledge, lack of understanding of what the whole project was about. I think that is one of the drawbacks why persons were not willing: lack of knowledge and when you don't have the full understanding.* – Prospect community focus group

In another case, one participant observed that some women would not participate in certain employment opportunities because of fear. In reference to her job as a driver in the tourism industry, she stated that some women in Treasure Beach would make comments such as: *You alone [driving to Montego Bay from Treasure Beach]; you are a woman, doing that alone – are you crazy?*

Association between fear and uncertainty and other indicators, as shown in Figure 7.24, influenced the nature of fear and uncertainty in the lives of research participants.

Mental myopia: This indicator was connected to four indicators across two dimensions of poverty. Data analysis revealed that mental myopia was mainly linked to lack of participation in productive activity. More in-depth analysis uncovered mental myopia as a contributory factor in lack of participation in productive activity as well as fear and uncertainty. These relationships identified that psychological poverty directly influenced material poverty.

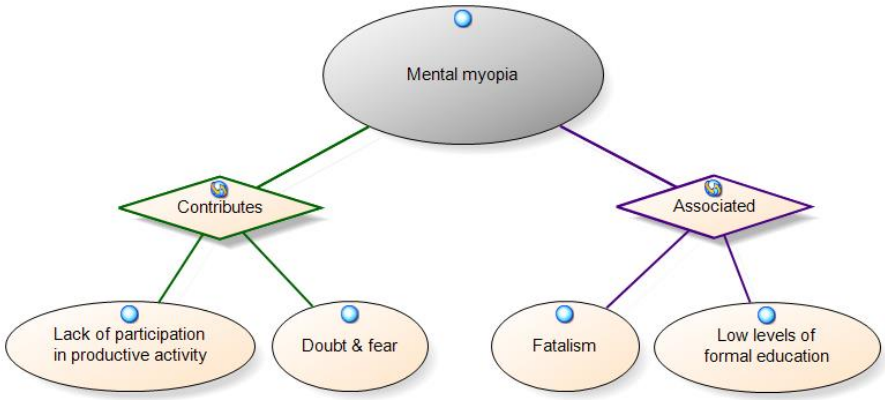


Figure 7.25 Mental myopia and relationships with other indicators of poverty

The following comments further illustrate the far-reaching effect of mental myopia on lack of participation in productive activity. In Mango Valley, members of the focus group explained the rationale for ceasing experiment with wine production which included their perceptions about eggshell. They stated: *… Because we thought eggshell is supposed to be raw, but it wasn't raw it was just our thinking, it really wasn't raw.* Similarly in Prospect, participants suggested that community members opted out of the REDI project when it was revealed that it was different from what they had perceived: *… So when they found out that it wasn't quick-cash, some wanted back their money and some sold out their shares to others.*

Associated relationships between fatalism, low levels of formal education and mental myopia, as shown in Figure 7.25, was quite revealing in terms of the nature of mental myopia.

Low self-worth: All four dimensions of poverty were connected to low self-worth. Significant relationships uncovered during data analysis were the causal effect of abusive relationship and low levels of formal education on low self-worth. It was also revealed that low self-worth was mainly associated with doubt and fear.

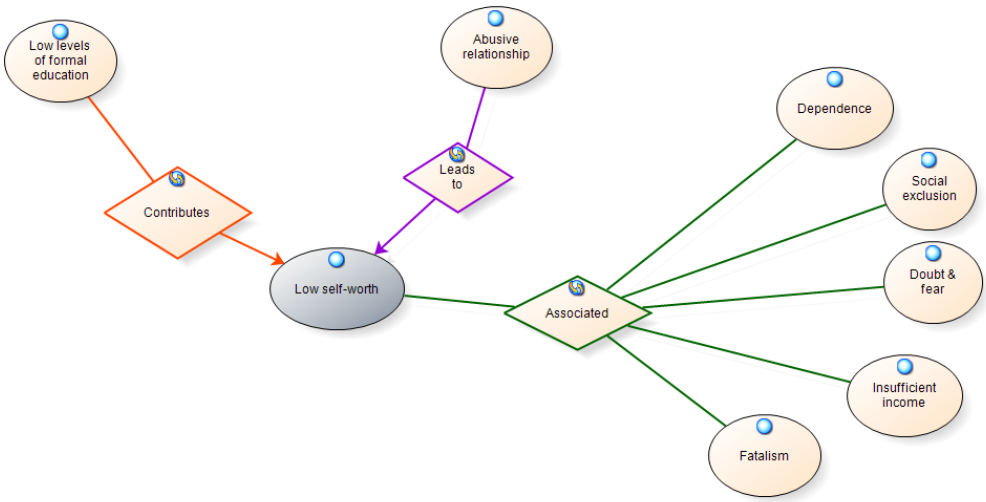


Figure 7.26 Low self-worth and relationships with other indicators of poverty

The following quote further illustrates how abusive relationship led to low self-worth for one of the participant, she stated:

> *I had a relationship five years after my husband left and it was one of the worst mistakes of my life. It affected my self-esteem and caused me to doubt myself in terms of my choices in life.* – 62-year-old woman, no children and craft entrepreneur

Low self-worth was also associated with several indicators, as shown in Figure 7.26. These relationships had a role in the structure of low self-worth.

Laziness: Laziness was connected to six indicators in all four dimensions of poverty. Exploration of the data from the participants discovered laziness was frequently coupled with lack of participation in productive activity. Strong evidence of a

contributory relationship between laziness and dependence as well as lack of participation in productive activity was found during in-depth analysis (see Figure x). The most interesting data in Figure 7.27 is that unemployment and underemployment contributed to laziness.

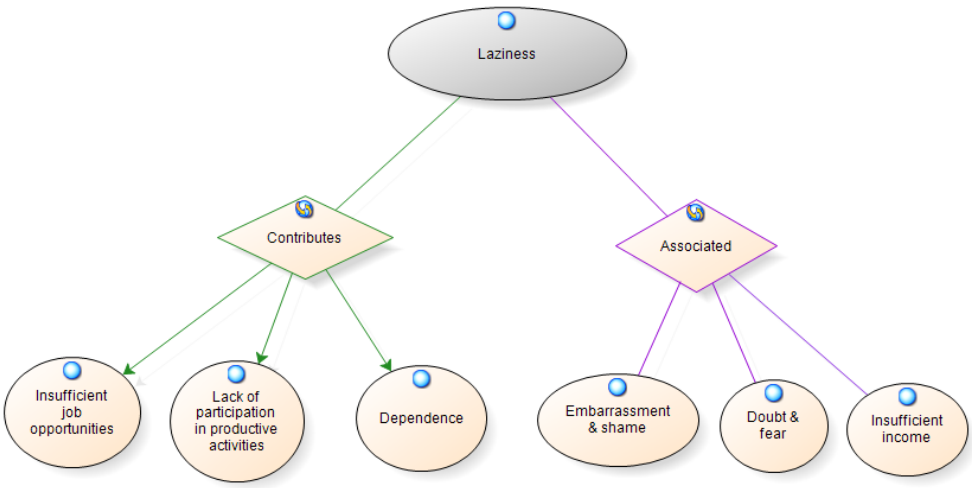


Figure 7.27 Laziness and relationships with other indicators of poverty

Data from the participants conveyed that laziness was associated with several other indicators, as shown in Figure 7.27, which influenced the formation of laziness.

Discouragement: This indicator was connected to five indicators across two dimensions of poverty. Significant relationships unearthed from the data were the frequent associations between discouragement and limited access to utility and facility. Further analysis identified that dependence, praedial larceny and unemployment and underemployment all led to discouragement, as shown in Figure 7.28. these directional relationships revealed that discouragement was underpinned by social and material poverty. The data from participants also showed that discouragement contributed to social exclusion.

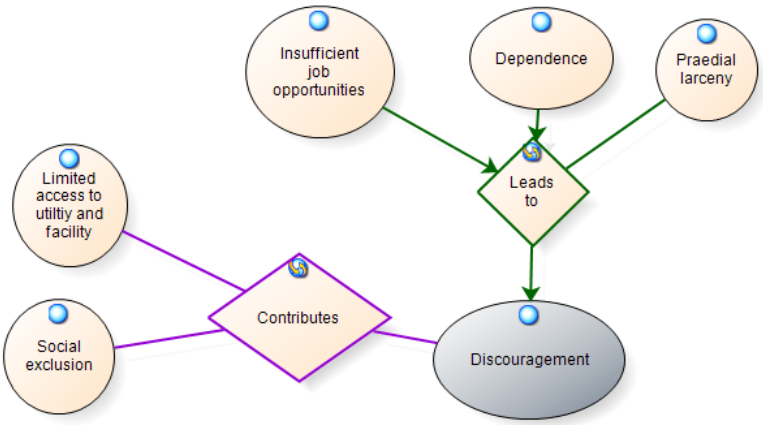


Figure 7.28 Discouragement and relationships with other indicators of poverty

Data from the participants also exposed that discouragement was associated with several indicators, as shown in Figure 7.28, which influenced the nature of discouragement.

Fatalism: Fatalism was more frequently associated with unemployment and underemployment. Overall, analysis of the dataset uncovered that unemployment and underemployment led to fatalism. This relationship shed light on the direct impact of material poverty on psychological poverty.

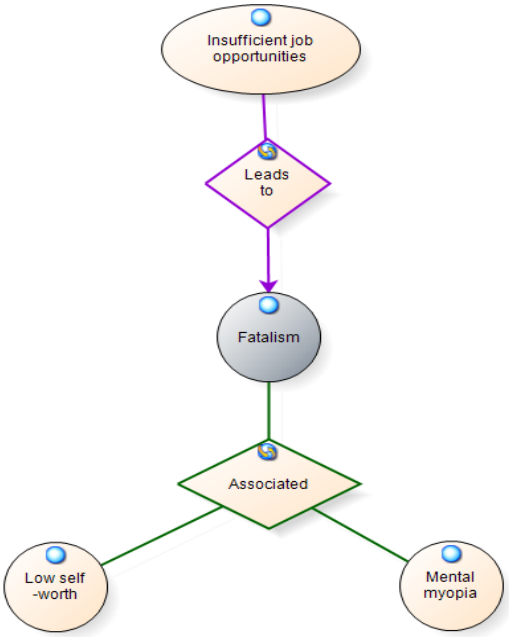


Figure 7.29 Fatalism and relationships with other indicators of poverty

Fatalism was associated with low self-worth and mental myopia, as shown in Figure 7.29, and these relationships had a role in defining the nature of fatalism.

Nine psychological indicators of poverty were identified from the narratives of the sample of participants. A tapestry of poverty was revealed, with intensity that generally extends beyond the borders of multiple dimensions. In general, the intensity of their psychological poverty was so far-reaching that it had a significant role in social exclusion, lack of participation in productive activity as well as unemployment and underemployment. The strongest relationships, in their psychological poverty, seemed to have been those composed of mental myopia, laziness, depression, embarrassment and shame.

7.4.4 Relationships between physical and other indicators of poverty

Low levels of formal education: Eleven indicators of poverty across all four dimensions were linked to low levels of formal education. Overall, exploration of the data indicated frequent association between low levels of formal education and unemployment, underemployment, insufficient income and limited access to utility and facility.

In-depth analysis revealed some directional relationships significant to the nature of low levels of formal education. These relationships were denoted by the connector *'leads to'*, as shown in Figure 7.30. What stands out in Figure 7.30 is that insufficient income led to low levels of formal education. The following quotes illustrate the positive correlation between insufficient income and low levels of formal education.

> *[In Maggotty we saw] children not going to school because of lack of money.* – Maggotty community focus group (men)

> *Sometimes you don't have any money to provide anything to send the children them to school.* – 42-year-old mother of five children, caregiver and self-employed

Other interesting relationships illustrated in Figure 7.30 – low levels of formal education led to social exclusion, embarrassment and shame as well as unemployment

and underemployment. These causal relationships illuminate how physical poverty aggravated social, psychological and material poverty.

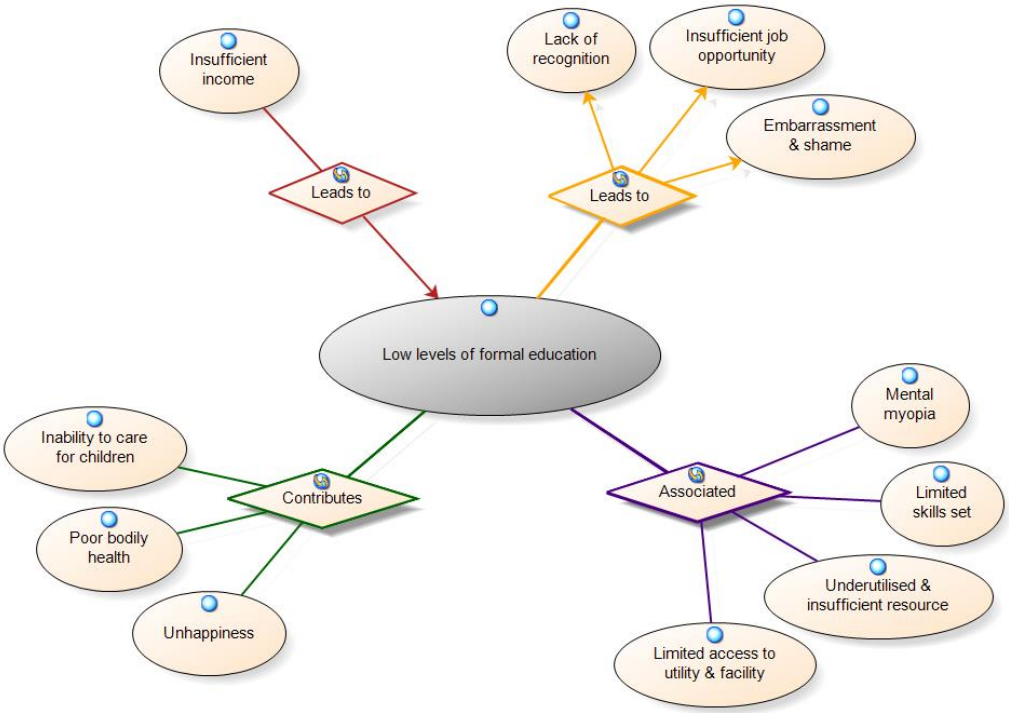


Figure 7.30 Low levels of formal education and relationships with other indicators of poverty

Indicators that appeared to have contributory and associated relationships with low levels of formal education, as illustrated in Figure 7.30, also influenced the structure of low levels of formal education.

Poor bodily health: This indicator was connected to eight indicators across all four dimensions of poverty. Overall, data from the participants indicated that poor bodily health had strong links to insufficient income and insufficient food. Content analysis of the dataset uncovered that insufficient food led to poor bodily health, as shown in Figure 7.31. Other interesting relationships illustrated in Figure 7.31 are the causal correlations between poor bodily health and depression, insufficient income as well as lack of participation in productive activity.

These relationships indicated the far reaching effects of poor bodily health on psychological and material poverty in the lives of the research participants. For example one of the participants described the correlation between poor bodily health and depression. She explained:

… When I got sick there were persons in the group I could trust and really talk to on a more personal level. There were things I would say to them and they would assure me that everything would be okay and that there is no need to really worry… Going through my journey they made me feel loved and feel like somebody cares - somebody realise what I am going through and that was a plus for me. It brought joy to me, it made me feel really, really happy [because] there were times when I was depressed and [they] would come over. – 42-year-old mother of three children, caregiver and business owner

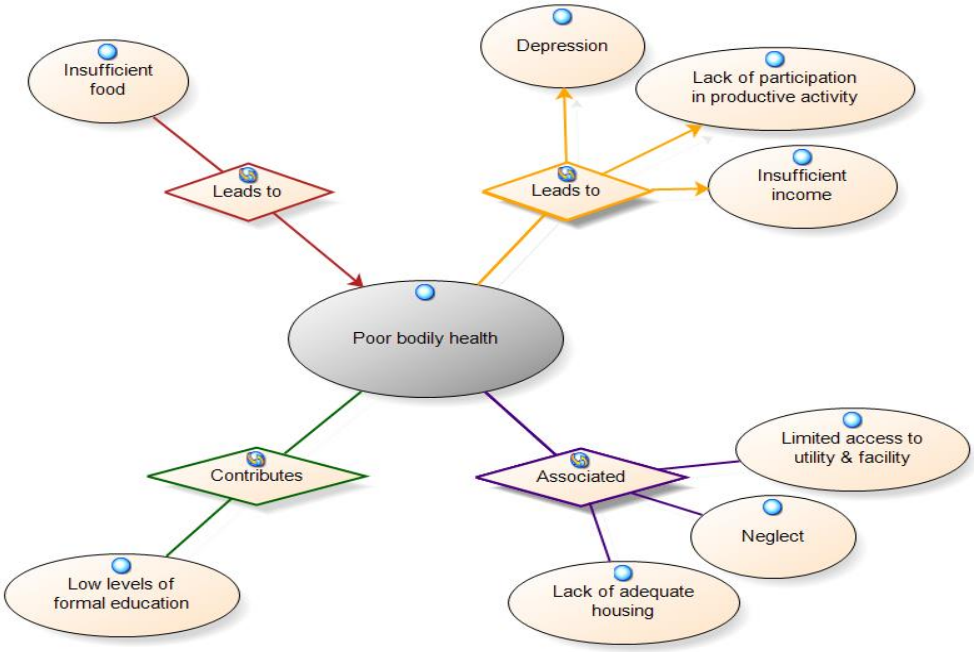


Figure 7.31 Poor bodily health and relationships with other indicators of poverty

Indicators that had contributory and associated relationships with poor bodily health, as illustrated in Figure 7.31, also influenced the nature of poor bodily health.

Lack of participation in productive activity: Across all four dimensions of poverty there were connections with lack of participation in productive activity. Overall data from the participants suggested that lack of participation in productive activity was predominantly associated with laziness, mental myopia, fear and uncertainty as well as embarrassment and shame.

Detailed content analysis of the data uncovered that poor bodily health led to lack of participation in productive activity, as shown in Figure 7.32. What is striking about the data in Figure 7.32 is how psychological poverty (laziness, mental myopia, fear and uncertainty) was pronounced in its influence on physical poverty (lack of participation in productive activity).

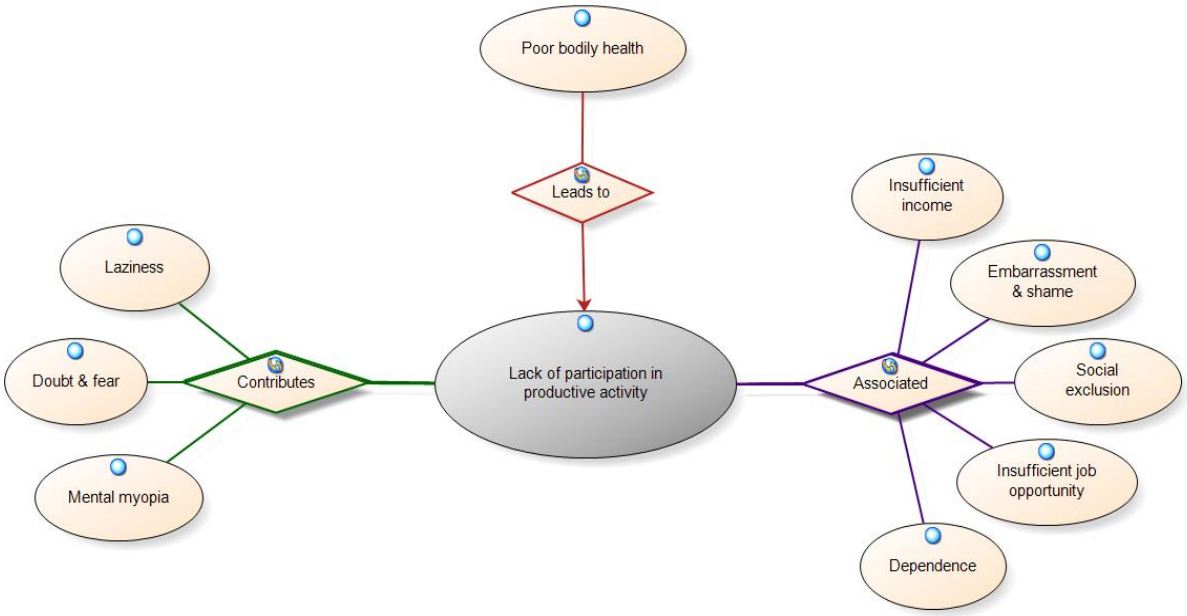


Figure 7.32 Lack of participation in productive activity and relationships with other indicators of poverty

A majority of the participants who commented on this indicator felt that laziness had a strong contributory role in lack of participation in productive activity. Some of the views expressed about this relationship are as follow:

> *Simple grass-weeding and we don't have anybody to do it. Poverty is laziness… The other day I couldn't find anybody to do the grass-weeding and yet I see them sit down on the road side. If you try to do something the poverty will change you can't sit down and fold your hand, you must do something, anything as long as it is not stealing.* – 47-year-old mother of four children, caregiver and subsistence farmer

> *… I don't see this in the young women but especially the young men: they look [date] the white girls to chat-up and get their money; they are looking the easy kind of work. I see laziness in these guys…* – 52-year-old woman, no children and hospitality entrepreneur

> *From a cultural perspective, I see poverty as laziness – there are so many things that one can do to help themselves to take them out of a rut… If you sit and wait on somebody to hand you things then you will lose out on life. I don't believe in giving a man a fish every day I would rather give him a hook and line for him to go and fish. It's a sign of laziness to sit and wait on hand-outs.* – 59-year-old father of two children and teacher

Several indicators that had associated relationships with lack of participation in productive activity, as illustrated in Figure 7.32, impacted the structure of lack of participation in productive activity.

Limited skills set: Limited skill set was connected to three indicators in two dimensions. Exploration of the data from the participants identified two types of relationship were between limited skills set and the other indicators as shown in Figure 7.33. From the analysis, Figure 7.33 illustrates that limited skills set was contributed by limited access to utility and facility. Unemployment, underemployment and low levels of formal education were associated with limited skills set, as illustrated in Figure 7.33. These relationships revealed that limited skills set was mainly affected by material and physical poverty.

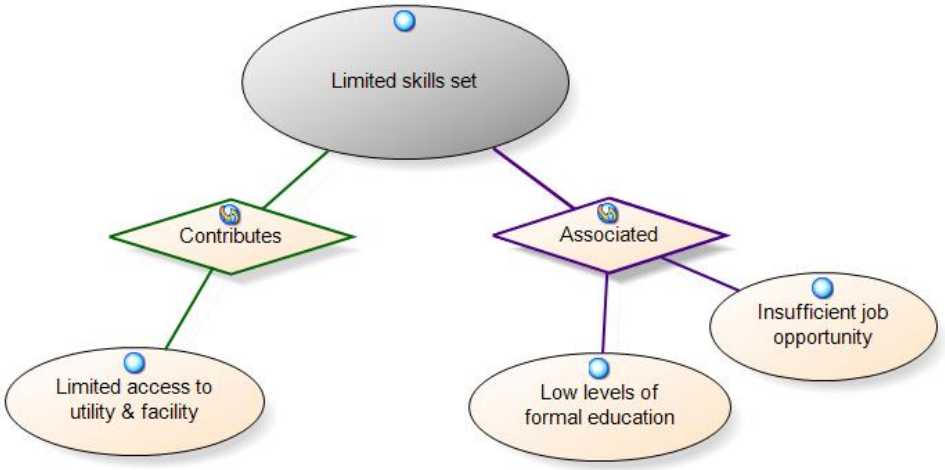


Figure 7.33 Limited skills set and relationships with other indicators of poverty

Four physical indicators of poverty were identified from the narratives of the sample of participants. A tapestry of poverty was revealed, with intensity that generally extended beyond multiple dimensions. In general, the structure of the physical indicators was mainly influenced by limited access to utility and facility, as well as insufficient food, poor bodily health, abusive relationship and laziness. The intensity of their physical poverty was so far-reaching that it had a role in social exclusion, insufficient income and unemployment and underemployment. The strongest relationships in their physical poverty seemed to be those structured by low levels of formal education and poor bodily health.

7.5 Summary

This section presented findings emergent from analysis of data concerning how the study participants connected various aspects of their life experience in regard to how these may have affected their level of poverty. Analysis involved exploring the

relationships between 29 indicators across four dimensions of poverty. Overall, those self-reported connections indicated that the structure of their poverty was predominantly determined by unemployment and underemployment, low levels of formal education, abusive relationship, mental myopia as well as embarrassment and shame. One of the characteristics of their poverty, its intensity, was far-reaching.

Although only two-way relationships were examined, linkages within and across dimensions revealed that some indicators, such as insufficient income, unemployment and underemployment, were interrelated to several material indicators as well as linked to numerous social, psychological and physical indicators of poverty. The findings in this section indicate that in the context of multiple deprivations, some types of poverty generate, aggravate and compound other forms of poverty.

The next section, therefore, moves on to identify the impact of the REDI project on rural women within such context of multiple and complex poverty. Knowledge of those unique relationships was useful in providing a broader informational base for evaluating both the intended and unintended impact of the project. In the final section, this broader knowledge of the nature of their poverty assisted in explaining some of the possible conversion difficulties faced by the sample of rural women, in pursuit of their valuable freedoms and the quality of life they have reasons to enjoy.

7.6 Section C: Impact of REDI on rural women

Turning now to the experiential evidence, this section provides findings concerning the impact of the REDI project on the sample of rural women based on their experiences. The previous section outlined how coupling of deprivations occurred and complex relationships are formed within the context of multidimensional poverty as experienced by the study participants. It is the presence of these complex relationships in the lived realities of the research participants that warranted an evaluation that goes beyond prescriptive assessment. Hence, this section contains findings pertinent to both the intended and unintended impact of the REDI project on rural women.

In order to go beyond the prescriptive assessment, effects at both the individual and community levels were included in the evaluation. These two levels were included because they are central to evaluation within the capability paradigm, for two main

purposes. First, evidence of poverty and coupling of deprivations are generally found at both the individual and community levels (Sen 1993, 1999). Furthermore, personal experiences of the sample of rural women were embedded in the community settings and together represented key aspects of their lived realities. Second, they constitute environments where valuable objects and capability sets can be identified and measured (Sen 1993). Therefore, both levels remain vital in ensuring that not only the actual impact of the REDI project on the deprivations of the sample of rural women and their communities was uncovered, but also the freedoms they have to pursue the real quality of life they perceived as valuable. An elaboration of the freedoms and valuable objects of the research participants is discussed in the ensuing section of this chapter.

The intended long-term goal of the REDI project was to increase employment opportunities and income of rural residents. Three of the key intermediate indicators of this goal, outlined in Table 7.2, were used to assess the effectiveness of the REDI project. The indicators identified were processes to improve infrastructure, to increase the number of functioning rural enterprises and employment, and to facilitate growth in sales and marketing of products for these enterprises.

Three aspects of the subjective experience of the participants represented the unintended impact of the project. Project participants were asked to comment on the ways in which they collectively and individually experienced the REDI, their emotional responses and the meaning they attributed to those experiences.

Findings from analysis of the study data concerning the intended and unintended impacted were summarised and presented in the following Table 7.2.

Table 7.2: Overview of intended and unintended impacts of the REDI Project

Sub-project & type	St. Thomas Women's Agriculture Initiative Protected Agriculture (Greenhouse) Technology: 1A – Agriculture	Maggotty & Its Environs Benevolent Society Pig production: 1A – Agriculture	Prospect Pig Farmers' Association Pig production: 1A – Agriculture	Treasure Beach Women's Group Benevolent Society Promotion and Training: 1B – Tourism
Year of grant approval	2012	2010	2010	2010
Intended impact:				
Grant amount (JA$)	4,467,200	11,000,000	11,000,000	1,470,500
Community contribution	1,990,000	1,638,000	1,540,000	650,000
Infrastructure improved	Yes	Yes	Yes	Yes
Employment increased	No	Yes	Yes	Yes
Market expanded	No	Yes	Yes	Yes
Unintended impact: Group benefits	- Group investment - Exposure to new things - Practice new ways of doing business - Training - Additional infrastructure	- Group investment - Training - Meeting new people - Learning from other groups Additional infrastructure	- Group investment - Training	- Group investment - Self-confidence - Pride - Accomplishment
Problems	- Poor quality top-soil - Low-grade seedlings - Limited participation	- Long waiting period between submission of proposal and approval - High cost of pigs feeding - Misconception about subproject	- Delays - Limited knowledge of JSIF in agriculture production - Misconception about subproject	- Limited organisational and management structure - Heavy bureaucratic processes
Problem solving skills	- Work collectively as a group - Sought external assistance	- Work collectively as a group and with JSIF	- Work collectively as a group and with JSIF	- Work collectively as a group and with JSIF
Emotional experience	- Hope - Disappointment	- Hope - Pride	- Pride - Gratitude - Sense of accomplishment	- Dissatisfaction - Self-confidence - Sense of accomplishment - Pride
Meaning of project participation	- Resilience - Optimism - Aspiration - Gratitude - Accountability	- Food security - Aspiration - Optimism	- Self-development - Aspiration	- Greater accountability - Resilience - Connection - Aspiration - Freedom - Motivation

As outlined in Table 7.2, according to the project participants, the unintended consequences of REDI were the group benefits, problems encountered, practicing problem-solving skills, positive and negative emotional experiences, as well as what the meanings attributed to their participation in the REDI. These consequences were included because they contributed to a more nuanced assessment of the influence of the REDI project on the quality of life of the participants.

At the time of the fieldwork, the Mango Valley group was still waiting on approval of their requested funding from JSIF to participate in the REDI. As a result, no evaluation of the REDI was conducted for this community. The findings for this section relate to the participants and communities of Bath, Maggotty, Prospect and Treasure Beach, as shown in Table 7.2. Presentation of the intended and unintended impacts of the REDI on the four community subprojects begins with the St. Thomas Women's Agriculture Initiative in the Bath community.

7.6.1 St. Thomas Women's Agriculture Initiative (STWAI)

7.6.1.1 Intended Impacts

Infrastructure development: STWAI is located in the community of Bath, in the parish of St. Thomas. It began in March 2000 as a project of the Bureau of Gender Affairs (formerly Bureau of Women's Affairs). Before the intervention of the REDI, the group had leased a 30-acre farm property, which had an office building on site, access to water as well as two dilapidated structures which previously functioned as greenhouses. The group also carried out cash-crop farming on approximately half an acre on the farm property.

In May 2012 this community venture received a grant investment from the JSIF under the REDI for JA$4,467,200 (US$50,700)[3]. Along with this investment the STWAI added a community contribution of JA $1,990,000 (US$22, 600). This overall investment of approximately US$73,000 ensured the construction of two greenhouses and the provision of two water tanks, top soil, tomato and capsicum seedlings and other

[3] Exchange rate as at 31 May 2012 US$1: JA$88.12. Source: Bank of Jamaica Foreign Exchange Trading Summary http://www.boj.org.jm/foreign_exchange/fx_trading_summary.php

supplies. Furthermore, repairs were undertaken and included the addition of a door on the water-pump structure. The construction of the greenhouses took place between November 2013 and January 2014 and was built by workers from outside the community. The group resumed greenhouse production of tomato and capsicum in February 2014. Participants noted that all the intended benefits were provided by the JSIF under the REDI project.

Plate 7.1 Infrastructure development on the farm of STWAI in Bath, St. Thomas
Source: Fieldwork, 25 August 2014

Participants explained that the first crop of tomato and capsicum (sweet-pepper) was planted during February 2014, then reaped and sold in May 2014. The group was unable to state the amount of money earned from their first crop of produce. Fieldwork during August and November 2014 revealed that there was no new crop in the greenhouses, as the members were clearing them of disease-infested seedlings. At the time of the last field visit in November 2014 the six members of STWAI had benefitted from only one crop of production of tomato and capsicum in the greenhouses.

Plate 7.2 Greenhouse #1, disease-infested capsicum seedlings – STWAI in Bath, St. Thomas
Source: Fieldwork, 25 August 2014

Plate 7.3 Greenhouse #2, partially cleared of disease-infested tomato seedlings – STWAI in Bath, St. Thomas
Source: Fieldwork, 25 August 2014

Employment growth: When asked in August 2014 whether or not the REDI project support made a difference to their income and employment opportunity, most of the participants alluded to such outcomes as futuristic. They stated:

> *The only difference is the greenhouses, although nothing has started as yet… The greenhouses and a pump were requested in the proposal and provided, although we have not benefited from the farming as yet.* – Bath community focus group

Market expansion: Participants understood that one of the objectives of participating in REDI was to improve sales through expanded marketing. However, when the participants were asked about marketing expansion they noted that the duration of the marketing support provided under the REDI was shorter than expected. At the time of the fieldwork they had no confirmed new business or company through which to market their products. The participants collectively stated:

> *In the proposal they [REDI] said they would help to provide market for us but after the first crop they didn't provide any more help. We had to seek markets ourselves in Morant Bay.* – Bath community focus group

By way of probing the intended impact of the subproject, participants were asked to express their desired needs and explain to what extent the subproject met such need or needs. The features of REDI that appeared to have had an impact on the desired needs of the participants was the infrastructure improvement, specifically, the two greenhouses. However, in the short-term, members of the focus group stated that the subproject did not meet their desired financial needs: '*The support they provided have not met our needs… We want to work and make our money and when we go home we can buy something and "throw our partner"*[4]*…*'

[4] 'Partner' or 'partners' is a communal saving system which functions as an accessible credit service for low income earners in Jamaica. Edwards (1980, 49) describes the operation of this version of mutual funds: *An initiator-leader or "banker" contacts an optional number of participants or "throwers" to contribute equally an agreed sum of money each week, fortnight or month for as many intervals as members. According to lots taken at the commencement of the throwing period, each participant "draws" the sum of each regular instalment until the turns have taken full course.*

7.6.1.2 Unintended Impacts

Unexpected benefits, problems and solutions: One of the first collective activities carried out by each group under the REDI was to source 20% of the value of the subproject as a community contribution. All members of the focus group were aware of the required community contribution and the challenging processes by which it was sourced. The participants collectively explained:

> *We didn't have everything, so we had to borrow it because we didn't have everything… It was rough [challenging]… So we gave it in cash and labour as community contribution.* – Bath community focus group

In exploring the unintended impacts of the project, participants were first asked to explain whether or not they experienced any unexpected benefits or challenges from the REDI. Unexpected benefits mentioned were exposure to formal business operation, business development training, additional infrastructure and new ways of experiencing leisure. The STWAI participants talked about their exposure:

> *Exposure! Exposure! A little adventure [the women laughing]. The disaster management training was at Riu Hotel, an all-inclusive hotel; there was a lot of food. I have never before seen so much food available for my choosing! I have never been to that parish or hotel before, I have never heard about it before. The greenhouse training was at Jamaica Grande – we enjoyed ourselves! I would want to go back there right now [the women laughing]. They took us many other places that we didn't know.*

During field visit in November 2014, the group had acquired an additional storehouse through the REDI. This infrastructure was not part of the initial plan of the group.

Plate 7.4 Newly acquired storehouse – STWAI in Bath, St. Thomas
Source: Fieldwork, 11 November 2014

One of the questions sought to ascertain whether or not, the group, encountered any problems during or after the implementation of their subproject. This was a two-part question, with the second part exploring how the problem or problems were addressed. Three problems were discussed during the focus group discussion – poor quality top-soil, low-grade seedlings and limited participation in the supply of the required farming resources.

In discussing the poor quality of the top soil the participants noted:

> *… After the greenhouses were constructed they told us we didn't have the right soil so they were going to buy the top-soil for us – the compost soil… so when the top soil came, it was the worst thing – we found pieces of toilet-bowl, big stones, pipe, pampers, bob-wire – it was supposed to be refined – there shouldn't be any major rough stones or other items in the top-soil… The group notified RADA of the poor quality of the top soil… It's like they got it from a dump-site. But if they had told us to get the top soil we could have got top-soil for ourselves but they didn't tell us to get any…*

Furthermore, they lamented about the lack of participation and low-grade seedlings:

> *… The same person who sowed the seedlings also carried the top-soil… but what really happen is that we normally sow our seeds… The first greenhouse we got we sowed the seeds right here – we set them, then when they became seedlings, we transplanted them down there – fertilise them, spray them and everything. We told them that we*

can do it [sow the seeds] ourselves… And they still didn't listen to us… We explained that everything done on the farm before was done by us – we tried to explain that we have some experience in greenhouse production… [Yet still] they called a man to set the seeds for us… They [JSIF] didn't business with [show disregard for] us, all I'm saying they didn't business they just did what they wanted… we didn't have a chance… We're not sure if they felt like we couldn't do it ourselves… Probably they thought we wouldn't do it the right way… We could do it! It's only because of the money – the money for the dirt and the money to plant it – that's why they didn't want to give it to us; it's just that – because we're poor and we are not supposed to get any of that money… They paid $20,000 to set seeds, while we could have set the seeds ourselves and get that money, look at how much money they paid for the top-soil – over $30,000 – and it wasn't good, that's wasted money – we then had to turn around and dig our own top-soil… We could have gotten some of that money… We purchase the seeds and gave them to sow and we didn't get back the right seedlings – we gave them salad seeds and then they refund us with plummy seeds… and old boy seedlings…

STWAI group members addressed the problem of poor quality top-soil by using only some of the supplied portion with some other top-soil which they excavated from their farm. However, the participants believed that the poor quality of top-soil negatively affected the yield in the greenhouse production. They claimed it contributed to the seedlings being infected by white-flies and curved-leave diseases. They noted that assistance from RADA was requested to address the disease infestation. At the time of data collection in August 2014, they had completed removal of the infected capsicum seedlings and started taking out the tomatoes. Additionally, they were removing the top-soil and cleaning out the greenhouses to restart production. The participants were unable to state how long the de-infestation process would take or how soon they would restart the greenhouse production.

As part of the solution, the group suggested that in the future they planned to use top-soil from the farm property and sow their own seeds, which they hope will give them a sense of greater participation in the preparation phase of production. During the field visit in November 2014, it was observed that both greenhouses were cleared of the infested seedlings.

Plate 7.5 Both greenhouses cleared of infested seedlings – STWAI in Bath, St. Thomas
Source: Fieldwork, 11 November 2014

Emotional experience and meaning attributed to project participation: Participants were asked to discuss the overall difference in their lives that resulted from their participation in the REDI project as well as their emotional experience. The participants on a whole expressed mixed feelings of hope and disappointment about the role of the REDI project in their lives. They stated:

> *It built up my hope and then my hope dropped down – because after getting the two greenhouses and the seeds in them we thought that something would happen and then on the way it stopped working – it made me feel like I don't even want to bother to do anything again or even come to work… Sometimes I don't come because when I have pain in my feet and then to walk come up here and sit down… I only want to come if there is something to do.*

In summary, participants were asked to describe the overall effects of the REDI project on their quality of life and to express some final comments on their experience. Most members of the group expressed resilience and optimism in the face of challenges, and noted some of their aspirations as well as a sense of gratitude for the benefits of the REDI project:

> *But because we are rural women and we love farming we won't let that [the problems with the REDI] cause us to stop along the way… We are just going to move on because we won't let that 'stifle' [restrain] our future because you can't 'quarrel over spilled*

milk'. We just need help – right now we are working with what we have; right now we're trying to plant something in the soil since we don't have anything in the greenhouse. We will have to pay RADA for ploughing the soil and then do some farming… We got the greenhouses and so things will be easier for us; it's all up to us. So we have to help ourselves – we can't sit down and depend on the people all the time, we have to help ourselves. Things change, see we have the greenhouse, which we didn't have before… [We hope to have] the greenhouses up and running and every week we can have our own money, own transportation to go around and sell our produce, a tractor, doing more of the greenhouse activities by ourselves. We are going to work ourselves out of the poverty to get the good life. We want to get the greenhouses up and running. We have reached too far to turn back. [Also] we need some more men on the farm.

7.6.2 Maggotty and its Environs Development Committee Benevolent Society (MEDC)

7.6.2.1 Intended Impacts

Infrastructure development: This benevolent society in the community of Maggotty, in the parish of St. Elizabeth began in April 2004. Before the REDI project intervention, it was actively providing assistance to farmers, schools and the elderly members of the community. Apart from the group being registered and functioning as a social structure, they had no infrastructure. In January 2010, the society received a grant investment of approximately JA$11,000,000 (US$123,000)[5] from the JSIF under the REDI project. Along with this investment and community contribution of JA $1,638,000 (US$18,000), the group constructed a pig production facility. Participants stated that the intended benefits received under the REDI were for the facility, piglets, initial feeding, training and marketing support. All the intended benefits were provided and the group began pig production in April 2013, approximately three years after the grant approval.

Employment growth: When asked whether or not the REDI support made a difference to their income and employment opportunity, the participants discussed various employment opportunities that were accessed by community members as a result of the subproject. They noted that during the construction phase (2010-2012) of the facility approximately 25 community members were employed for about 12

[5] Exchange rate as at 29 Jan 2010 US$1: JA$89.70. Source: Bank of Jamaica Foreign Exchange Trading Summary http://www.boj.org.jm/foreign_exchange/fx_trading_summary.php

months, with each earning on average JA$1,200 or US$14 per week[6]. Most of those households had no other fixed sources of income during that period.

Plate 7.6 Pig production facility in Maggotty, St. Elizabeth
Source: Fieldwork, 17 September 2014

After approximately three years of operation, in September 2014 at the time of fieldwork, there was one full-time worker (male) at the pig production facility, along with three part-time workers (female). The full-time worker did not state his income; the part-time workers earned JA$1,500 or US$17 per week, whenever they choose to work. Additionally, the participants stated that some community members who worked during the construction phase used their income to start small businesses. The participants stated:

> *It [REDI sub-project] does help, [because] I can get $1,500 this coming Friday and I can buy little things and 'squeeze' a little change to send my daughter to school…* – 43-year-old mother of four children, caregiver and seasonal personal service worker
>
> *The project created opportunities for persons in the community who previously had none. These businesses are still viable today and are growing. For the business opportunities most persons went into chicken rearing. Several others purchased goats; others bought snacks and drinks to sell to the other workers on the site. REDI's contribution expanded peoples' income and provided employment opportunities. The*

[6] Annual average exchange rate for 2010 was US$1:JA$87.38
http://www.boj.org.jm/foreign_exchange/fx_rates_annual.php

project has made a difference in the level of poverty, and the needs that were there before. Parents, who couldn't send their kids to school, now are able to send them. – Maggotty community focus group (men)

Plate 7.7 Pig production cycle stages at MEDC pig production facility in Maggotty, St. Elizabeth

Source: Fieldwork, 17 September 2014

Some participants, mainly the women, viewed the REDI subproject as an alternative employment opportunity with minimum benefits:

> *… If you know that, for instance, you won't have any money when next week comes, then you can easily spend the week down by the 'hog-pen' so that you can collect a little change.* – 43-year-old mother of four children, caregiver and seasonal personal service worker

> *It does help a little… [It is] no big money… every weekend we get a little stipend. If you go down there [pig facility] and help then you get a little stipend… if you don't work you can't get [any] money… when you go down there you are not just going for a one*

day, if you have the time you go down there for the week… – Maggotty community focus group (women)

I haven't gone there since this week… I'm not going down there because I'm supposed to reap my peanut this month and it has a lot of grass and I have to be over there pulling out the grass so I'm not going down there this week… For me it helps with just hand-to-mouth. – 67-year-old mother of 11 children, subsistence farmer

Market expansion: Participants understood that one of the objectives of participating in the REDI project was to improve sales of their products through expanded marketing. When asked, 'After receiving the support from REDI, to which new businesses or company have you been able to sell your products?' The overall response to this question was positive. Some of the members noted:

REDI helped us with the marketing of the pigs, by providing us with the names and numbers of the necessary contacts we could initially sell to. We have subsequently established other contacts and it is consistent. Now we provide these people with the meat once the pigs are ready. So we don't have to be scampering around to find people to market the product to. We have the small jerk-shops that will take a pig or two from us as well, so the market is fairly good. – Maggotty community focus group (men)

Research participants were asked to express their desired needs and explain to what extent those needs were met by the subproject. Members of the female focus group agreed that their main need was to have decent work with adequate earnings that is stable and secure. In response to whether or not REDI met that need, the participants gave no affirmative response. One informant stated: *'If you have the time you can get $1,500 per week…'* And another commented: *'No* [it didn't meet my need for a job]*, this is just 'hand-to-mouth'…* The men stated that it exceeded their expectation and needs: *'In terms of what we requested from REDI in our pig production proposal I would say we have received all that and even more.'*

Overall, the participants identified that the intended infrastructure development has exceeded their expectations. The employment opportunities were cyclical with high growth experienced during the initial phase of implementation but plateaued out during normal phase of operations. They stated that REDI assisted them to identify new markets, even as they maintained existing ones and they described the benefits experienced from operating with clearly established marketing opportunities. In general, it seems REDI has achieved its intended goals and the Maggotty community

participants appeared to have had a high level of satisfaction with the achievement of the intended benefits of REDI.

7.6.2.2 Unintended Impacts

Unexpected benefits, problems and solutions: In response to the question: 'How did your group provide the required 20% community contribution?' The overall response to this question was positive and some of the participants expressed their belief about the importance of their contribution in the sustainability of the subproject. Members of the female focus group stated: *'The group came together and made a little contribution towards it.'* While members of the male focus group reported:

> *We had no issue with the contribution that we had to give – sweat equity as we called it; we thought it was very fair. We have always said: "A father would not take up that amount of money and give to his child." REDI and JSIF took up so much money and gave to us, and we only had to contribute 10-20% out of it. Giving our 20% helped us to be more responsible, as we put effort and energy into doing our part. We therefore had a vested interest in what we were doing. Contributing to the work was very necessary. Our contribution was split in 10% cash and 10% labour. We have members in the society who assisted in providing the cash contribution so we pooled our monies together because we didn't have a lot of savings put aside… Overall, the community contribution or sweat equity was very important. When people help to build something they feel it belongs to them and they therefore take care of it, show more dedication to it, and they work harder to see it grow and also to maintain it.* – Maggotty community focus group (men)

In exploring the unintended impacts, participants were asked to explain whether or not they experienced any unexpected benefits or challenges from REDI. In response, members of the female focus group commented on training, meeting new people and learning from others as unexpected benefits of the project. They stated:

> *We got a lot of teaching because they taught us how to rear the pigs… Yes, and we went to different places and met other people too… Say for instance, when JSIF wanted to meet with us we met in other places… You get to meet new friends plus a lot of teaching from their group because when one interacts with the other you learn a lot…*

Members of the male focus group also mentioned training as one of the unexpected benefits, as well as additional funding and a bio-digester:

> *For us the training period was very beneficial, in one instance, five of our members were taken to an all-inclusive hotel for a period of five days for training. Some of us have never experienced this before – it was exciting and we had a good time [men*

> *laughing]… As stated before they increased the funds from the initial amount of JA$4,500,000 to JA$11,000,000. We also got a bio-digester which costed over JA$4,000,000 – we didn't request that. The bio-digester converts the faeces of the pigs into gas, which is then used to generate electricity or used as cooking gas. It works very well! This therefore significantly cut down the expenses to buy gas. We are also now going to use it as heater to warm up the young pigs, thereby eliminating the need to use electricity.*

Problems encountered and ways of addressing them during and after the implementation of the pig production facility were explored as unintended impact. Participants in the female focus group noted that there was no problem. Three problems were highlighted during the male focus group discussion – the long waiting period between submission of proposal and approval, high cost of feeding the pigs, and a misconception about the operation of the subproject. However, the participants later stated their understanding of the delay and then rationalised that the delay was not a problem. The participants then discussed the high cost of feeding and proposed solutions. They explained:

> *The proposal took some time to be approved, but we understand the reason for that… So we really wouldn't consider the waiting time a problem. The biggest challenge we presently have is the expense of the pig feed – it is very expensive and the pigs eat a lot! The more pigs we have the more feed we have to purchase. The feed will go up consistently, but the meat doesn't. We have to find ways and means to get around this. We are looking into planting cassava, because we were told that it is just as good as the feed and then we will add nutrients and other things to it and make our own feed. If we can do this, we will be at a good point.* – Maggotty community focus group (men)

Here is the description along with the action taken to address the misconception about the subproject, as put forward by the participants:

> *When we got the money, there was a misconception that everyone would get a portion [of the money] to then go and do their own pig production or goat-rearing, so we had to correct that thinking on the part of the members [by explaining] that this was not an individual effort, but a collective and community project, to benefit all of us.* – Maggotty community focus group (men)

Emotional experience and meaning attributed to project participation: The emotional experience of their participation was one of the outcomes included in this section on the unintended consequences. In order to explore this aspect of their participation, participants were asked to state the overall difference made to their lives as a result of participating in the REDI project, as well as to express the emotions that

accompanied their participation. In general, most participants expressed a sense of hope and pride as they experienced new opportunities as a result of the project. They stated:

> *It's a little different because basically you know you can go and do something [by the farm] and you know you can achieve a 'change'; so before we had the pigs we never achieved anything but once you go down there [the pig production facility] and do something you can achieve… I feel proud of it because it helps to build up the community… I'm proud of it because we got a lot of exposure in each thing [area] because sometimes some people don't really know how to use a push-broom and when you go down to the other people [groups] you learn from them how to use the broom and shovel… I'm proud of myself as a Jamaican woman.* – Maggotty community focus group (women)

> *We felt good when we got the additional funding; even now we are feeling good! It was the first time we saw something of this magnitude take place around here. We feel very proud and excited that we have helped to make this happen. The impact to our community was tremendous, as many people in the community benefitted by gaining employment in the construction phase. Our dream is always to make our community of Maggoty a better place.* – Maggotty community focus group (men)

In summing up the interview, participants were asked to describe the overall effects of the REDI project on their quality of life and to express some final comments about their experience. Most of the women commented on the support of the REDI project in providing subsistence food for them and their families. Participants in the male focus group were futuristic and expressed optimism about the role of REDI in their lives and the community:

> *I'm a little bit better because I can find myself something to eat and I have somewhere to sleep… It helps… It is a good benefit because if you get two hog-feet and piece of hog-head and tonight you have little flour and you never have any meat you can cook little of the hog-feet and you will have something [to eat].* – Maggotty community focus group (women)

> *I foresee that in the near future, persons purchasing cars and building houses from the income they are now earning.* – Maggotty community focus group (men)

In total, participants were aware of some of the unintended consequences of their participation in the project. Training, interactions with new people, learning opportunities and additional funding were some of the unexpected benefits identified by the participants. They also acknowledged that they encountered several problems such as unanticipated long waiting time, expensive operational cost of the facility and managing misunderstandings about the project from community members. Along with

these unintended consequences the participants also had positive psychological experiences such as having a sense of hope and pride and feeling optimistic about their participation and the outcomes of REDI.

7.6.3 Prospect Pig Farmers Association Cooperative Society Limited (PPFA)

7.6.3.1 Intended Impacts

Infrastructure development: This cooperative society in the community of Prospect, in the parish of Manchester began October 2008 as a RADA-supported Production Marketing Organization (PMO). The main goal of the group was to support the farmers and community members impacted by the closure of the bauxite company, ALPART, in 2009. RADA provided them with technical support and farming resources. Prior to the REDI project the group had no physical infrastructure. In 2010 the PMO was renamed and registered as a cooperative society as preparation to participate in the REDI project. In the same year the group was approved by the JSIF through the REDI project for grant investment of approximately JA$11,000,000 or US$126,000. Along with this investment and their community contribution of JA$1,540,000 or US$17,600, the group constructed a pig production facility and began pig-rearing in March 2012.

Plate 7.8 Pig production facility in Prospect, Manchester
Source: Fieldwork, 25 October 2014

Participants stated that at the proposal stage of their subproject they were not fully aware of which needs they wanted to address or the intended benefits they desired from the REDI project. They reported that through community meetings the JSIF

provided guidance which helped the group in choosing its subproject. Participants in the focus group explained their decision making process in choosing pig production:

> *Well, of a fact I didn't even know what I was getting into. I just heard about it [REDI] and I said: "this could be a good plan for the community of Prospect" – so I just went straight ahead, without any knowledge of it [REDI] and from there it just began to unfold and then we moved from there and this is what it is now… I remember at one of the meetings when they [JSIF] came they were asking what is the best thing for the community because they were saying Irish potato and we said no because there is no water and the climate here is too hot. They said chicken or goat and we said we don't think so because of the area; pigs were suggested and we said that could work better.* – Prospect community focus group (women and men)

The group further reported that they have seen the business grow from *'5 sows, 1 boar, 100 wieners'* to *'14 sows, 2 boars and 186 wieners'* over a two-year period. In total, the group reared approximately 243 pigs and of that total they purchased 130 and produced 113. In addition, they explained their understanding of the benefits, specifically, the duration and process by which they will accrue benefits:

> *We have sold over $3 million worth of animals [pigs] already… All of that went back into the business… I would say I'm hoping that in the first six years we would be able to have some dividend but for right now we are still in transition; but our members understand and know that in any business there are no quick returns in the start-up. So we are not looking for dividend until – as we just start just three years now – maybe another three years before we see anything that is substantial in terms of return. –* Prospect community focus group (women and men)

Employment growth: When asked whether or not the REDI project support caused their income and employment opportunity to increase, the group stated yes and noted that currently they have one full-time and one part-time worker. They further explained:

> *Yet it's early days because the objective is really to help provide employment in the community and also self-development in the community and other people, even students, because even Montego Bay Community College took their A-Level environmental group to the facility for a day. Other schools are calling; places are calling; a lot of students from CASE are calling asking for information regarding the facility whenever they visit the website. It is really assisting in terms of self-development.* – Prospect community focus group (women and men)

A probing question was fielded to the group to identify the direct benefit or benefits to the individual group members. They collectively responded:

> *It's [the benefit] not showing as yet and the benefit we are getting now is training – we are getting a lot of training because of the pig facility. We are being trained in the different areas [of pig production].* – Prospect community focus group (women and men)

Construction of the pig production facility began in 2011 and was completed February 2012. They stated that some community members were employed during the construction phase. After approximately two years of operation, in 2014 at the time of fieldwork, there was one full-time worker (male) at the pig production facility, along with five part-time workers (female and male). The income of the workers was not stated.

Market expansion: Participants understood that one of the objectives of participating in the REDI project was improved sales through expanded marketing. Their marketing opportunities included other farmers and meat shop operators in and around the communities of Prospect.

Participants noted that several public and private partners further contributed to the development of the pig production facility. The Digicel Foundation was one of the private partners who donated a water tank to enhance the operation of the facility.

Overall, the participants identified that the intended infrastructure development has exceeded their expectations mainly because at the start they were unaware of what to expect. The employment opportunities were cyclical with high growth experienced during the initial phase of implementation but plateaued out during normal phase of operations. They stated that their main marketing opportunities were other farmers and local meat shop operators. In general, it seems REDI has achieved the intended outcomes in the Prospect community and the participants expressed high levels of satisfaction with the achievement of the intended benefits of REDI.

Plate 7.9 Members of the Prospect Pig Farmers Association Cooperative Society Ltd. and Digicel Foundation staff at the handing-over of the water tank at the facility in Prospect, Manchester on 21 March 2013

Source: https://digicelfoundation.wordpress.com/2013/03/; retrieved 23 January 2017

7.6.3.2 Unintended Impacts

Unexpected benefits, problems and solutions: In exploring the unintended impacts of the project, participants were first asked to explain any unexpected benefits or challenges that resulted from the participation in the REDI project. In response members of the focus group commented on training as an unexpected benefit of the project. They stated:

> *Training – and we are still getting training. There is still training with the fire department… A lot of training... We got training through the REDI, JSIF, cooperative societies, RADA… Every aspect of the operation in safety, in management practices, accountability, everything… We were trained on exporting… One benefit we can say we are getting is training and it exposed us to all different areas… Even though we are in operation, we are still getting training from all different entities. We have to organise a group from here in the event of any disaster so we can be called upon to help with rescuing.* – Prospect community focus group (women and men)

In response to the question about the required 20% community contribution, there were diverse responses, whereas, some members were willing to participate in a group project while others wanted individual projects. This component of the subproject represented benefits, problems and a solution for the participants, in that, they had to

work together to arrive at a solution in spite of being confronted by challenges. Members of the focus group recalled:

> *We had to come up with $450,000 so each member contributed $25,000 in cash and $25,000 in sweat equity… Individuals were invited to become part of the group after it was introduced and they were told what it was about… We had more members but because of an initial misunderstanding: the members thought it would have been an individual benefit but when persons found out that it would have been a cooperative benefit and not an individual benefit, persons pulled out. Because they wanted to have their own little take – "give me my two pigs and I will rear my two pigs"; but they didn't want to be part of a group. So about 25 of us came together collectively and decided to be part of this group, thus the Prospect Pig Farmers Association came about. –* Prospect community focus group (women and men)

During the discussion on problems encountered regarding the REDI-funded initiative, participants identified two challenges, specifically, delays between approval and start-up of their subproject as well as the limited expertise of JSIF in agriculture enterprises. They noted:

> *… After it [their pig production proposal] was approved, it took quite a while, we were anxious because we were having meetings and we kept asking "when are we going to start"… but after we got the first deposit in our account I think it was smooth sailing.*

The group then gave their perspective of the limited knowledge of JSIF in the area of agriculture production and what that meant for the organisation and their subproject:

> *A challenge that we might have – they said to us that this is the first time that they were going into farming because they are more familiar with doing like schools and roads. So this was the first one [agriculture production] and so they had to start from A right down to Z so it took a long time… We were the 'guinea pig'… They didn't know anything about farming so we were the first one.*

In terms of JSIF being new to project implementation in agriculture production, the group stated that that influenced a closer collaboration between them and JSIF and provided opportunities for innovations. The group stated that they managed the period of delays through three-way information dissemination:

> *We kept constant dialogue with them [JSIF], so we were being kept abreast at each stage and status of each little drawback we had… And once we got that information we met as a group and disseminated the information… Whenever one of us went to a meeting, the individual informed the secretary upon her or his return… [Then] we had to give a report to the group.*

Emotional experience and meaning attributed to project participation: In exploring the emotional experience of their participation, participants were asked to state how they felt and the overall difference made to their lives as a result of participating in the REDI project. In all cases, the participants made reference to some aspect of self-development and positive emotional experiences. One informant referred to the training to exemplify her experience of self-development:

> *… It is important that whatever training you can be a part of you are to do it; we know how important it is, even on your resume. [For example] they are doing a project now at my workplace with Red Stripe – you know Red Stripe is going into the cassava [production] – and because of my involvement… they have approached me, wanting me to manage that project for them because of my expertise and work with the cooperative… So sometimes we get these training and we don't realize that they can become assets for us. So I take out of it [my participation in REDI] self-development.*

Another female informant expressed feelings of pride and an example of better social cohesion:

> *I feel much comfortable at this moment with it… Well I'm very proud… We're not getting money in hand [as yet] but things are going on for us, we as women – and we were not close to Mr 'James' and now when we see Mr 'James' we share a lot of jokes.*

Two of the male participants added their perspectives in examples of self-development, feelings of gratitude and accomplishment in the context of doubt:

> *As my wife made mention of self-development, through this it has helped me to look into my own church community where I see that a lot of help is needed and I do a lot of teaching. I realized that it has enhanced my teaching, because I have moved from just audio teaching to visual aid that can enable me to capture the attention [of the congregation]… Yes, I got help through this [REDI sub-project]… I got self-development from it, it really motivates me.*

> *I'm grateful to know that I'm a part of this thing even from the initial stage and it gives me the desire sometimes to tell people that some of the perceptions they have, don't just hold on to your own perceptions. Listen to other people and what they have to say and what they have to offer. Because at first when we start off with this thing, sometimes we hardly wanted to mention it to some people because the perception that they had was not good. Some of them said – "don't bother come to me with that". Others expressed their doubts by saying, "have you ever seen anything good happen here?", and "who is going to take up their money and give it to you?"… Right now I'm grateful when I look at that building over there to know that we are a part of this group…*

At the end of the interview, participants were asked to describe the overall effects of their participation in the REDI project on their quality of life and to express some final

comments on their experience. Members of the group shared their aspirations of expanding the pig production and through it they hoped to make a greater contribution to the development of their community. They echoed:

> *We have plans for future development. We don't want it to be as it is now. Our aim is to have an abattoir there, also to have a processing plant where we can make our own ham, make our own sausages, and we can have a wider area of employment for people within the community. Those are our objectives, so we have great plans for it. It's going to take time but once the foundation is strong then we are going to build on the foundation.*

Taken together, the participants indicated awareness of some of the unintended consequences of their participation in REDI. Numerous training opportunities were the main unexpected benefits discussed by the participants. They acknowledged that while some community members were willing to participate others were hesitant about being involved mainly because they had expected the subproject to operate at an individual and not a group level. Unanticipated long waiting period between proposal and implementation phases was discussed as a problem, while the limited expertise of the project staff members in agriculture enterprises was noted as a challenge. The approach taken to address the difficulties was highly consultative between REDI staff members, participants and community members. Along with these unintended effects, the participants expressed having positive psychological and social experiences such as feelings of self-development, pride, gratitude as well as having better social cohesion along with a sense of optimism about the future.

7.6.4 Treasure Beach Women's Group Benevolent Society (TBWG)

7.6.4.1 Intended Impacts

Market expansion: This benevolent society in the community of Treasure Beach, in the parish of St. Elizabeth began in September 2000 as a project of the Bureau of Gender Affairs (formerly Bureau of Women's Affairs). The building in Plate 7.10 TBWG's Treasure Hunt Craft Shop in Treasure Beach, St. Elizabeth is owned by TBWG and functioned as an art and craft shop, an office and a community meeting room.

Plate 7.10 TBWG's Treasure Hunt Craft Shop in Treasure Beach, St. Elizabeth
Source: Rhiney (2013, 30)

The items in the craft shop were produced by community artists and while training activities were conducting in the meeting room, it was periodically rented as a source of income generation. In 2010 the group received grant investment from the JSIF under the REDI project in the amount of JA$1,470,500 or US$16,800. Along with this investment and their community contribution of JA$650,000 or US$7,400, the group increased the stock of raw materials for the production of craft items, created a website for marketing and participated in several operations and management training activities. The focus of the REDI support was to enhance marketing and management operation of the group.

Plate 7.11 Earrings and Starlight candle holder – products manufactured at the Treasure Hunt Craft Shop in Treasure Beach, St. Elizabeth

Source: Fieldwork, 19 September 2014

Plate 7.12 Craft items manufactured by artists in the Treasure Hunt Craft Shop in Treasure Beach on sale

Source: http://tbwgjamaica.com/?history retrieved 26 January 2017

Some of the members were not fully aware of the intended benefits of the REDI support. However, a majority of them mentioned the training activities and one informant elaborated on some of the intended marketing benefits, she noted:

> *I think [it was] to polish up a lot of their edges; especially the most involvement I know about was with the website because we were given money to upgrade the entire website and also the craft shop which was great. Which have been huge because the spill over of that has touched so many people and so many artisans have bring their work there and there are more tourists that know about it so we will be able to sell more. I am so thrilled that they are going to be getting a new credit card machine that will increase their sales as well. I actually have guests that come down at least once a year and they have a small gift shop in New Hampshire, USA and they buy a whole heap of things from here and bring it and sell in New Hampshire. They advertise it as local artists from Treasure Beach, Jamaica so that's huge.* – 52-year-old woman, no children and hospitality entrepreneur

Participants gave mixed responses to questions about market expansion. One informant indicated, at the time of data collection, that the group was not engaged with any new company or business but was rather exploring new markets through the support of a small group of volunteers. Another member reported cases that suggested improved marketing and sales to new and existing individuals and groups. When asked to give examples of new marketing opportunities she noted:

Some of the group might have existed, but they have gotten 'a shot' in the arm. There is a local guy here who produces honey, the bees produce the honey, and then he bottles it and now is given a place where he can sell that honey, which is the Craft Shop. He is encouraged to increase the production and find a nice new label – its Parchment Honey and it has a reputation for itself, you can view it on the website. Again JSIF gave the money for the website to be redone. People overseas can now take a look at it before they arrive. Someone else with their hot pepper sauces, somebody else with their jewellery, and different things like that. There is this guy that does beautiful Lignum-vitae jewellery, and before he would just kind of do it and have it in a bag… Now he can put it at the Craft Shop. He sells them regularly and he can make a good living out of it. He is not going to get rich or anything out of it but it's encouraging. – 52-year-old woman, no children and hospitality entrepreneur

Employment growth: When the members were asked whether or not the REDI project support made a difference to their income and employment opportunity, diverse perspectives were expressed. The group explained that in Treasure Beach, the main beneficiaries of the REDI project support were local artists who produced craft items that were sold in the Treasure Hunt Craft Shop. Additionally, they noted that the number of artists increased from approximately 40 to 80, and the revenue of the shop doubled from about JA$150,000 to JA$300,000.

Additionally, the majority of participants reported having access to additional income and employment opportunities through the group. They noted:

Our revenue in the craft shop more than doubled within a year. This increase goes to the artists because when their craft items are sold they receive 50% [of the sale price] if the material was supplied by us and 80% if they used their own material. The REDI project in essence has increased the economic empowerment for the community because we do not provide employment but instead create an environment where they can generate an income for themselves. – 62-year-old woman, no children and craft entrepreneur

I made three dolls since I joined the group [in 2012] – one was sold and so two are supposed to be at the shop… I think it [the doll] was sold for US$25… That's like about a year ago [2013], that's quite a while, so the dolls are not sold very fast so there is a gap between making the dolls and getting the benefits. – 62-year-old mother of four children, grandmother and subsistence farmer

It has provided additional employment in that whenever I am not at the Guest House, where I work, I would go to the women's group and create products for sale. When these items are sold it contributes to my income. However, a significant difference in my income is mostly evident during the winter tourist season. – 28-year-old mother of one child, pregnant and seasonal service worker

I got paid to do the website, but honestly and truly this is my mantra for this community: once one of us benefit we all benefit from the community. If I am

> *successful everybody is going to have a piece of that. If the brother-man across the street selling vegetables is successful we all have a piece of that. So when one person is successful everybody will gain something from that whether directly or indirectly, I believe that wholeheartedly.* – 52-year-old woman, no children and hospitality entrepreneur

In summary, the intended effects of REDI on the TBWG were expansion of market and employment growth. It was stated that the upgrade of the organisation's website and craft shop contributed to an expansion of both local and international markets. Additionally, the participants reported that the number of local artists doubled as a result of the REDI. However, some of the participants were unaware of the effects of REDI on the group and community.

7.6.4.2 Unintended Impacts

Unexpected benefits, problems and solutions: Regarding the required 20% community contribution, their infrastructure represented their contribution because the group was unable to provide it in cash. There were diverse responses during the discussion on unexpected benefits and challenges of participating in the REDI. Overall, the responses include comments on self-development, feelings of pride and accomplishment as some of the unintended benefits, while the problems were related to the preparatory and implementation phases. For example, one member suggested that self-confidence and pride were the main unintended benefits of participating in the REDI project undertakings at Treasure Beach. She explained:

> *Well, again, the intangible issues of self-confidence and pride. I think those are intangible but they are definitely the most important part.* – 52-year-old woman, no children and hospitality entrepreneur

It was suggested that aspects of limited organisational and management structure were some of the unintended challenges encountered by the group. She stated:

> *I think things could have been structured in a different way. For instance we could go to craft fairs but at that time we were not fully prepared because our products were geared towards tourists who were our customers. It was difficult to go to a Devon House Craft Fair which caters to locals, where the only product that would be suitable [for them] would be our starlight which is known both locally and internationally. I think if we had less emphasis on craft fairs and more on paying persons for the jobs*

they did, it might have help a little bit better. – 62-year-old woman, no children and craft entrepreneur

Recurrent challenges relating to the administrative process surfaced throughout the interviews. One informant stated, *'I don't know of any obstacle except for the administrative requirements.'* Another commented *'We had to do a lot of follow ups and paperwork…'* Still another lamented:

> *Going through the whole exercise was not easy, that thing was filled with bureaucracy, as many grants are, and it was a very difficult bureaucratic process… The bureaucracy, oh my gosh, there were so many forms, and rules and regulations. Crossing the 'T's and dotting the I's … I just literally say I can't do it any more I can't take it…*

There was no consensus on a specific action that was taken to address the problems related to the bureaucratic process but all suggestions indicated that they endured and completed the process. One informant noted, *'My friend – 'Mary' – was the one who did the most of it [paper work].'* Another noted, *'It's their job and it must be transparent, so we got ready for them anyway.'* She also felt that:

> *… It taught us as a group to be organised and structured and transparent. Some people are too careless and the money belongs to the government. So we learned how to be more responsible for other grant funding… We learned how to be more accountable.*

Emotional experience and meaning attributed to project participation: In capturing their emotional responses to their experience of REDI, the participants were asked to state the overall difference made to their lives as well as to express their feelings about their participation in REDI. Whilst a minority was dissatisfied with their involvement, approximately 85% of participants who responded to this question expressed a sense of pride and achievement regarding their improved skills and collective contribution to the community of Treasure Beach. The quotes below illustrate these different views.

> *Being in the women's group doesn't help my quality of life because they treat me like an idiot and treat me badly… I don't have any hatred against them. The Bible says when your right hand offends you, cut it off – so I stay away [from them]. But if they ask me to do something I will, but I'm not putting out as much effort as I did before.* – 72-year-old mother of seven children and subsistence farmer

> *I go back to self-confidence – the fact that the women have never done that [the process and procedure of grant funding] and they did it well. JSIF said that they were*

the best group they have ever dealt with – again, there is a sense of pride and a sense of accomplishment… There are some women in the group that have little or no education – there aren't a lot of opportunities in their lives, and now they are sitting there proudly and justifiable so… It [the women's group] makes me proud, very proud! I love seeing women working closely together. Women from varied backgrounds, experiences and economics all working together for a common goal is a wonderful thing… – 52-year-old woman, no children and hospitality entrepreneur

It gave me a sense of pride knowing that I am making a contribution and I am not just a body living in a community. It made me feel good, although it was frustrating at times. – 62-year-old woman, no children and craft entrepreneur

Well it makes me feel good because sometimes family members from foreign call… The other day someone said they went on the internet to the Treasure Beach Women's Group and 'Sandra' and 'Arlene' were there! (Women laughing)… Yeah, it was one of our cousins who called (Women laughing). Sometimes you feel good… Gosh, sometimes you are on TV; anything they are doing they always send it around (publicise it), the other one was a book on St. Bess… Yeah man, it keeps me occupied. – Treasure Beach community focus group

It makes me feel proud; there is room for improvement but I love it. I feel so excited that I can do something. It helps me to try new things and meet new people and I can learn new things because I have a brain. REDI improved my little skills and prove that there is a skill in me that I was not using, so if I keep on trying I will become better. – 47-year-old mother of two children, caregiver and service manager

It [my life] is different: Before I became a member of the group I was living with my baby-father and I was trapped. I felt imprisoned… I used to pass the women's group and wanted to stop but could not. Now that I am a member, I feel free going to the group and talking to 'Debbie'. – 28-year-old mother of one child, pregnant and seasonal service worker

At the end of the interview or focus group, participants were asked to describe the overall effects of the REDI project on their quality of life and to express some final comments on their experience. The TBWG was a sense of connection for one member and she observed that it provided support in many ways for the community. She noted:

I think it is the women that I met and formed a bond with… It fulfils my need for community. I cannot live in a sterile way in a place… I can't just live by myself. Also as a stranger, the women that I encountered fulfilled my need for a support system because no matter what, there is someone in the group that I can always call for help… Despite the presence of other community groups, the women's group is the only one that actually does the work in the community with the people. We do not blow our own trumpet and therefore most of what we do is not highlighted. We have medical clinics and animal clinics and have cleaned four of the six beaches in Treasure Beach. Hundreds of people within the community have benefited from our medical clinics… The TBWG house is the community gathering space where community meetings of importance are held… – 62-year-old woman, no children and craft entrepreneur

Another informant stated that it helped her in her role as a mother as well as provided additional income. She explained:

> *I am a single mother and participation in the women's group allows me to be a stronger mother for my son. They give me advice, encouragement and motivation as well as an additional source of income.* – 28-year-old mother of one child, pregnant and seasonal service worker

Still another member recommended greater communication between the group and members. She suggested:

They need to inform the members, although not all the members go to meetings, but inform the members when the meeting will be kept and if you can make it and if you cannot make it then you call back to say you cannot make it. Don't wait until you have special meetings to inform the members. – 62-year-old mother of four children, grandmother, care-giver and subsistence farmer

In summary, most of the participants indicated awareness of some unintended negative and positive consequences of their participation in REDI. Most participants described having a greater level of self-development as a benefit of their participation in the project. Some of the challenges encountered were limited organisational and management structure and difficulties with the administrative process of REDI mainly during the initial phase. The psychological experience was mixed, with some participants expressing dissatisfaction with their involvement in the TBWG because they felt excluded and belittled, while most of them identified with having pride and a sense of achievement as well as being more closely connected to the community members.

7.7 Summary

This section contains experiential evidence of the impact of the REDI project on the research participants. This evidence was collected through semi-structured interviews, focus group discussions and participant observation. Content and thematic analysis of the data revealed marginal benefits in relation to the intended impact of the intervention, with the infrastructure development being the most beneficial. Surprisingly, only a minority of participants identified improvement in their income

and employment opportunity. Most of them were optimistic about enjoying these benefits in the future. The most striking observations to emerge from the data comparison of participants across communities were their collective responses to problems, hope in the presence of adversity and the overall positive meanings attributed to participation in the REDI. Participation in the project meant aspiration, resilience, optimism, accountability and connection for majority of the sample of rural women. These findings were uncovered as unintended impacts.

Inclusion of the unintended impacts provided a broader informational base for the evaluation of the REDI investment and the ways in which it influenced the quality of life of the participants. Some of the effects related to various indicators of poverty that were presented in sections A and B of this chapter. Connections between these effects and poverty indicators were discussed in the next chapter.

In the next section of this chapter, these unintended impacts were contextualised in an elaboration of the freedoms and valuable objects of the sample of rural women.

7.8 Section D: Diverse perspectives of development for rural women

Section D presents findings for the fourth research question, which explored the perceptions of development for the sample of research participants. These perspectives include the experiences and perceptions of rural women, as well as the views of REDI project staff members and World Bank representative. Priority was given to three aspects, specifically, their perspectives of valuable objects, processes and opportunities for development. Within the capability paradigm these three aspects are significant to the process of development, which is based on the presumption that development is influenced by factors other than wealth accumulation (Sen 1999). Sen (1999) argues that what people desire and achieve is affected not only by their income but also by what they value, the procedures that allow them to independently pursue those desires and the favourable circumstances available to them within their personal and social environments.

The findings in this section start with the valuable objects of rural women, which include qualitative and quantitative data. This is followed by a presentation of the findings on multiple perspectives of development. Special attention will be given to the perceptions and experiences of rural women. Both adequate and inadequate processes and opportunities related to development are included in this section. It concludes with a summary of the findings.

7.8.1 Valuable objects of rural women: Qualitative findings

Qualitative data for this section was collected through semi-structured interviews and focus group discussions. Discussions with participants about quality of life, priorities and achievements provided qualitative data on the valuable objects of rural women. Valuable objects refer to things and human characteristics that are essential for a desired quality of life (Sen 1999). First, findings on valuable objects from the World Bank representative are presented, followed by that of the REDI project staff members and then the sample of rural women and men.

World Bank representative perspective. Perspectives of the World Bank representative suggested that the valuable objects should include access to education, healthcare, proper nutrition, income and resilience.

> *The Bank generally tries to identify indicators that can be measured easily, like every 6 months, because the alternative is a very expensive exercise, such as impact assessment… Hence we focus on narrow indicators… Access to education, health, nutrition, and income are the main indicators of well-being that we would focus on. We would also assess resilience…* – World Bank project leader for REDI

REDI project staff members' perspective. Perspectives of the REDI project staff members suggested that the valuable objects of rural women should include access to water, electricity, communication, education, healthcare, affordable transportation, land ownership and economic opportunities. They also stated that rural residents, in general, have an industrious mind-set and a sense of community, which were perceived to be valuable for a good quality of life. Furthermore, the staff members discussed some of the valuable objects of rural women as aspirations and achievements. The group noted:

> *Having water, access to healthcare, light, communication, education, transportation and being able to have ownership of the land that you reside on and… I think they will make the rest happen for themselves… They don't want everything from government… Rural people are generally industrious, they are hardworking [people] and they are prepared to work hard which I think is a good mind-set to have, generally there is that willingness to work hard… I think there is still a sense of community, for the most part, even though you have them being individualistic where their financial decisions may be concerned, I think that there is still a general sense of community.* – Focus group with the REDI project staff members

Rural women's perspective. Across all the communities the sample of rural women expressed the means by which they achieved their desired ends. Data analysis identified that participants in the community of Bath valued economic opportunities, having a stable job, having access to reliable transportation, having ownership of land, being able to pay all their utility bills, participating in community events, their children being educated, caring for the poorer members of the community, having a house and financial independence.

> *We would like the greenhouses to be up and running and every week we can have our own money; have our own transportation to go around and sell our produce… It's a long time we have been working for a van, and to even have a tractor, and doing more of the greenhouse activities by ourselves. We are going to work ourselves to step out of the poverty to get the good life… I desire my*

own land with my own house with all bills paid without any struggle, and have a stable job, whether I'm self-employed or employed… Work for what I want – work on the farm, and some money and a van. I have my 2 houses already… I want a house, a car and a good job that I can help my children to get a better education and I want to see the farm move forward so that we can employ more people and donate things to the poorer class of people… – Bath community focus group

In response to the question about their desired quality of life, a range of responses was stimulated in the Maggotty focus group discussion. Participants indicated that they value being able to attend church, having adequate housing, adequate and nutritious food, access to healthcare, their children being educated, sufficient clothing and being able to pay utility bills. They noted:

A good quality of life is to have everything to your comfort, like you have your good house, you can afford good food and if you're sick you can go to the doctor. [You also want to] *go to church, lay down into a good bed, have your children going to school* [and] *when they come home from school they come home and have dinner – have a good meal going to school – have a good breakfast… You want to know that you can provide everything that they want* [Interviewer: like what?], *food, clothes and a good pair of shoes,* [Interviewer: what else?] *If they are sick you want to be able to take them to the doctor.* [Interviewer: Anything else you would add?] *You want to know that when month-end comes you can pay your electricity bill.* – Maggotty community focus group (women)

Comments from the participants were analysed and it was identified that in the community of Prospect they value economic opportunities, being able to pay their utility bills, having savings, an industrious mind-set, being educated, serving God, helping others, good parenting and being optimistic. Below are excerpts from the interviews, which highlight valuable objects for their desired quality of life.

You have to work to have a good quality of life – as long as I can work and get pay or sell something and get my money on time to cover all my expenses and have something to put aside. If you don't work where will you get money? – 47-year-old mother of four children, caregiver and subsistence farmer

To serve God, trust in him and ask him to lead you in the way he wants; ask him to provide for you and ask him to give you the health and strength for you to continue the good work. I can't have a good quality of life without God. I grew

up in church and from an early age in Sunday school I always love singing this song during Sunday school: 'we go to Sunday school and try to keep the rule and every little boys and girls you should take them along…' We had this saying that salvation plus education equals success, with salvation first. It motivates me to do good and help people. It's the best thing – it gives me peace of mind. If you tell yourself that you have faith and hope then nothing can bring you down. The Lord will make a way. Sometimes I don't have anything and I credit and pray over it and God delivers… My words of strength are: "Seek first the kingdom of God and all these things will be added to you. – 51-year-old mother of four children, caregiver and subsistence farmer

Participants in the community of Treasure Beach spoke about numerous valuable objects. It was identified that they also valued economic opportunities, access to reliable transportation, paying utility bills on time, having a house, food security, access to healthcare, their children being educated, having children and grandchildren, sharing with others, as well as financial independence and a clear conscience. They expressed:

I want to earn my own money – that would be nice… I have a house and him [my husband] have a car… Sometimes to get around it's really difficult if you don't have your own drive… it would be good to have my own [car]. I would love to have my own drive to move from place to place so that I don't have to call somebody whenever I have to go somewhere – I have to beg them to come for me… For me right now I just want to see my daughter finish school, it's her last year in high school. To have a job that I can manage; I own a piece of land which is better than a lot of people… I have my children and my granddaughter… I want to travel but I can't be bothered with traveling because the visa approval process is too hard. – Treasure Beach community focus group

For me a good quality of life is having a well-paid job where I can pay all my bills and be very comfortable; a life where my son has all the materials necessary for school to help him to learn better and even for me because I want to go back to school to do business or something in the tourism industry. By the help of God I want to start next year. Also a good quality of life for me would be to have my own house and maybe start a business for example a guest-house or whatever the Lord has in store for me… – 28-year-old mother of one child, pregnant and seasonal service worker

A good quality of life is when you are independent – not dependent on anybody else. Being independent you don't have to depend on anyone to pay for you to see the doctor, you can pay for your own doctor's visit; you can find your way out for yourself you don't have to run to your neighbour for this or that. Because where I live, I have been living there for 27 years now and I never had to run to any of my neighbours to borrow this or that to put in my pot. – 57-year-old mother of eight children, caregiver and personal service worker

A good quality of life is the ability to sleep soundly in your bed at nights because you don't have a guilty conscience about anything. It is being able to help others even in the face of limited resources. This is what I learnt from growing up in a large family where one banana was shared between all of us… I just thought that was what it meant to be a contributing human being. So living a good quality of life means to have the will to share with others. – 62-year-old woman, no children and craft entrepreneur

… I like to help people and I like to give. When you help people you don't pile up things and you don't worship things. I am not dunce – I can put one and one to make two. I am kind and I love other people. – 72-year-old mother of seven children and subsistence farmer

7.8.1.1 Valuable objects as achievements and aspirations

While most of the valuable objects of rural women were discussed as achievements of their desired quality of life, some were identified as aspirations. These achievements and aspirations were categorised into four key components of their personal and communal life, specifically, social, psychological, physical and material, which included economic aspects. Table 7.3 contains data that elaborates on the achievements that the sample of rural women viewed as valuable.

Table 7.3: Achievements as valuable objects for rural women

Material	- Had jobs and sources of income - Managed personal enterprises - Paid utility bills - Being debt-free - Had personal bank accounts - Independent of financial support from male partner - Savings - Purchased items for children - Purchased items needed for self and family such as food, clothes, furniture, appliances, and others
Social	- Supported the needy - Volunteered in community activities - Shared with others about God - Felt safe in the community - Had meaningful relationships with members in one's community - Worked together for the community development - Relied on others in addressing community challenges - Being married - Accomplishments of one's children

	- Lessons learnt from parents and relatives - Educated one's children

Psychological	- Self-actualisation:
	  - Actualisation attained through self, children, family and community (elaborated below)
	- Financial independence
	- Faith and spirituality:
	  - Offered prayers to God
	  - Believed God is a priority in life
	  - Accomplishments attributed as gifts from God through prayer
	  - Devoted to church and serving God
	  - Relationship with God led to self-confidence, comfort and was a source of motivation
	- Resilience:
	  - Winning and losing were accepted features of farming
	  - Motivated by collective passion to continue farming in spite of multiple barriers
	  - Gained courage and motivation from challenges and deprivation
	  - Overcame poverty through education and hard work and was able to provide a better quality of life for self and children
	  - Contributed to personal and community development in spite of persistent challenges

Physical	- Good physical health - Gave birth to healthy children - Acquired skills

The data collectively identified many achievements in the material, social and psychological components, and only a few in the physical component. Closer inspection of the table shows that children, as a variable, were a common feature in their achievements across all components. An interesting finding about their psychological achievements was that some of the research participants appeared to self-actualise not only through self-fulfilment but also through their children, caregiver roles, family and community, as noted in in Table 7.3 and detailed below.

Detailed content analysis of the dataset revealed that several achievements of the participants were expressed as self-actualisation. Mediums of self-actualisation were self, as well as their children, family and community.

Exploration of the data uncovered that the participants were satisfied and motivated by a diverse range of things they had been able to do and be as individuals. Some

expressed their achievements in being able to do baking, manage poultry-rearing and pig-rearing micro-enterprises as well as being in leadership positions in corporate industry in the United States of America. In general, the analysis revealed that the participants associated positive emotions to having material possessions, such as owning a house, stove and vehicle. Being able to visit the doctor was also associated with a sense of fulfilment.

> *Yes, I'm proud of my poultry-rearing because even if I only have one-dozen chickens in the coop I can look at them and feel good… I'm proud of my little peanut farm that I planted because it means that I can reap it.* – Maggotty community focus group

> *I had the privilege of being at the top of the corporate world in America and my greatest experience was being the first black woman to have her own business on the floor of the American Stock Exchange.* – 62-year-old woman, no children and craft entrepreneur

> *But my relationship with God gave me confidence – I often fear that I would die and lose my soul. I no longer fear because I have my relationship with God – for me health, faith and strength are very important.* – 51-year-old mother of four children, caregiver and subsistence farmer

Others conveyed intrinsic motivation from their hard work, educating themselves, doing public-speaking, serving God and being able to prepare food for themselves and their family. Some participants associated a sense of accomplishment as they discussed being financially independent, healthy, relaxed and happy with their lives, being a Christian, being creative and having personal safety.

Emergent from detailed content analysis were frequent expressions of a sense of fulfilment and motivation from the participants toward their children and caregiving functions. This was evident across all four communities. For a majority of the participants, an expectation of reciprocal caregiving from their children in the future was the common reason put forward for the high regards associated with their caregiving roles and responsibilities.

In the Prospect community one of the participants explained that when she had a choice between expanding her business and sending her daughter to university, she chose the latter and stated the rationale for her choice:

> *I needed a car to carry the farm things to the market. I could have gotten the car or send my daughter to university… [I thought to myself] "The car could be easily destroyed but she will always have her education, and will help to care for me", so I*

> *sent her to university. My daughter is now going to play netball in Florida… She is traveling the world. That helps to motivate me.* – 51-year-old mother of four children, caregiver and subsistence farmer

Participants in the Maggotty community expressed a sense of fulfilment in their child-bearing roles and responsibilities:

> *Yes, I'm proud of having them I don't know which one out of the five of them is going to come and help me. Some people cannot have any at all, so I'm proud of my five and I love them so much… I'm proud of having eight children and they are all big now so if I'm sick they can bring me a cup of tea, this one can come and bathe me, this one can comb my hair… So I am proud… I sent my daughter to HEART* [The Human Employment and Resource Training Trust, National Training Agency] *at Ebony Park … now she has every HEART documents…* – Maggotty community focus group (women)

Similarly, participants in the community of Treasure Beach expressed positive emotional experiences toward their children:

> *…When he came home and saw it, he thanked me and told me that he loved me for buying him a bed. That made me smile and it encourages me to do more…* – 28-year-old mother of one child, pregnant, caregiver and seasonal service worker

> *… My son is here, he is everything to me… I have one granddaughter and if I didn't have anything in my life as long as I have my granddaughter, she means everything to me.* – 71-year-old mother of two children and retired health worker

Table 7.4 highlights aspirations that emanated from the data from the sample of rural women. Most of the aspirations were related to the economic and material dimensions, while psychological aspirations were the least common. Data from this table can be compared with the data in Table 7.3 above that shows the valuable achievements. Such comparison indicated that even though there were many economic and material achievements, the sample of rural women have many unfulfilled economic and material desires, given the numerous aspirations noted in that dimension in Table 7.4 below. Additionally, it is interesting to note that the psychological aspiration is connected to the economic and material dimension.

Table 7.4 Aspirations as valuable objects for rural women

Economic and material	- Access to decent work for self, children and partner - Home ownership - Ownership of business - Access to better quality transportation - Better quality food and clothing - Enterprise development and expansion - Access to land ownership
Social	- Participate in church activities - Provide assistance to others and the needy in the community - Greater assistance from the government - Leisure exploration of Jamaica
Psychological	- Financial independence
Physical	- Access to creative production - Educational travels - Access to higher levels of education for self and children - Access to better quality healthcare

Overall, the valuable objects identified from the perspectives of the three different categories of research participants, World Bank representative, REDI staff members and rural women, showed a high degree of commonality. Two of those commonalities are outlined here. The first is that all three perspectives recognised access to healthcare, education, income and resilience as fundamental. Second, procedural influence was a factor in their identification of valuable objects. Detailed content analysis revealed that procedural influence as one of the areas in which the perspectives differed. Another difference revealed by the content analysis was that valuable objects as achievements and aspirations were found mainly in the data from the sample of rural women. These and other differences are expounded in the section on the process of development. Findings from the quantitative data on valuable objects are outlined in the following section.

7.8.2 Valuable functionings and capabilities: Quantitative findings

In this section the focus is on the ranking of the indicators and dimensions of capabilities. Table 7.4 displays the four key dimensions and the 13 indicators.

Table 7.3: Valuable capabilities for the sample of rural women in Jamaica

Dimension	Indicator
Economic	- Being able to participate in productive activities - Having ownership of productive assets - Being able to invest in children
Social	- Being able to participate in community activities - Having a relationship with children - Being known/having affiliation - Having a loving and faithful partner
Psychological	- Being independent - Being cautious - Being motivated
Physical	- Having bodily health - Being able to have children - Having skills and practical knowledge

Error! Reference source not found. and Table 7.4 was discussed with some of the research participants during phase two of the fieldwork. The outcome of that consultation along with the literature review guided the development of the capabilities in Table 7.4 The capabilities in Table 7.4 were then used in a questionnaire survey. Valuable capabilities of the sample of rural women were ranked in order of importance. The capabilities were ranked within and across dimensions. This meant that the capabilities within each dimension were compared with each other and then the dimensions were ranked among each other. The rankings were calculated for the indicators of economic, social, psychological and physical dimensions. The calculations were done with the total sample (N = 69). The results are presented below starting with the economic capabilities.

Table 7.4**:** Distribution of most valuable economic capabilities

Ranking	*Participants*(*N*=69)	%
Being able to invest in children (for those with children)	39	56.5%
Being able to work	23	33.3%
Having ownership of productive assets	6	8.7%
No answer provided	1	1.4%

The participants were asked to rank the three economic capabilities in order of importance, by using the number '1' to indicate the most important and '3' to show the least important indicator. Of all the participants who ranked their economic capabilities, Table 7.6 shows that 56.5% of them ranked *being able to invest in*

children as the most important economic capability. *Being able to work* was ranked as second in order of importance (33.3%), while *having ownership of productive assets* was ranked the least important (8.7%) capability. After the ranking of the capabilities, participants were then asked to name the reasons for the selection of their most important economic capability. For those who selected *being able to invest in children* as their most important economic capability, some of the reasons they stated are noted below and grouped by community. The two main reasons indicated by most of the research participants for selecting *being able to invest in children* as the main economic capability were their obligation to care for their children and the expected returns of reciprocal care from them in the future. These reasons were common across all five communities, as illustrated in Table 7.6.

Table 7.5**:** Investment in children and reasons for it being the main economic capability

Most important economic capability	*Community*	*Reasons for being most important*
Being able to invest in children	Prospect	- 'For them (children) to have a better life' - 'For him to be uplifted' - 'When I'm old they will care for me' - 'I get back the returns from investing in my children'
	Bath	- 'Because what I did for them they are now doing for me: give me food, money and clothes' - 'Later on I will have them to depend on' - 'Later on they can turn around and help me when I get old' - 'I don't want them to experience the hard life like I did and they might take care of me when they become adults' - 'Because they are my pension'
	Logwood	- 'Being a single parent that's what I have to do' - 'To care for my children/family'
	Maggotty	- 'They help me whenever I'm in need' - 'For them to be able to help themselves' - 'There is nobody else to help him' - 'It's my duty to care for them' - 'Because they cannot help themselves, so I have to care for them until they have "passed di worse"
	Treasure Beach	- 'It's being able to care for my children/family' - 'They are my old age pension' - 'Have a secure family life' - 'Because he came from my body and is part of me' - 'Because it's a way of experiencing love and enjoyment' - 'I didn't go to school and so I invest in them for them to have more than I did – a better future, and possible to help me later on'

		- 'Because they come first – I live my life already so I have to take care of them – it's their time now' - 'My children come first because they don't have their father to support them' - 'My kids come first because I want them to have more than I did – an education' - 'There is no-one else to care or invest in them' - 'I want the best for her – a brighter future'

7.8.2.1 Returns on investment: types of and status of returns on investment

The 39 research participants who selected *being able to invest in children* as the main economic capability indicated that they invested money and time in their children. The data collected suggest that on average each rural woman spent approximately JA$26,000 or US$225[7] on their child or children during the month before data collection and spent an average of seven hours doing childcare during the day before data collection. At the time of data collection, the participants specified that their children were either working, attending school, unemployed or in the state of infancy. For the 51% or 20 participants who noted that their children were working 30% of these participants received approximately JA$14,500 or US$125 during the month before data collection. For the other 49% or 19 participants, 74% of them indicated that their children were attending school; 26% noted that their children were infants; and 11% stated that their children were unemployed. However, these categories were generally not discrete, except for those with infants. Some participants indicated that they had children working, going to school and unemployed.

Table 7.6: Distribution of most valuable social capabilities

Ranking	*Participants* (*N* = 69)	%
Having a relationship with children	44	63.8
Having a loving and faithful partner	15	21.7
Being able to participate in community activities	6	8.7
Having affiliation	2	2.9
No answer provided	2	2.8

[7] Exchange rate as at 30 January 2015: US$1 = JA$115.81 retrieved from http://www.boj.org.jm/foreign_exchange/fx_trading_summary.php on 11 April 2017

The participants were asked to rank the four social capabilities in order of importance, by using the number '1' to indicate the most important and '4' to show the least important indicator. Of all the participants who ranked their social capabilities, Table 7.7 illustrates that 63.8% of them ranked *having a relationship with children* as the most important social capability.

Table 7.7: Distribution of most valuable psychological capabilities

Ranking	*Participants* (*N* = 69)	%
Being independent	47	68.1
Being motivated	15	21.7
Being cautious	7	10.1

Table 7.9 reveals that *being independent* was ranked as the most important psychological capability by 68.1% of the participants.

Table 7.8: Distribution of most valuable physical capabilities

Ranking	*Participants* (*N* = 69)	%
Having good bodily health	46	66.7
Being able to have children	20	29
Having skills and practical knowledge	3	4.3

The participants were asked to rank the three physical capabilities in order of importance, by using the number '1' to indicate the most important and '3' to show the least important indicator. Of all the participants who ranked their physical capabilities, 66.7% of them ranked *having good bodily health* as the most important physical capability, as shown in Table 7.9.

7.8.3 Development processes and opportunities

Processes and opportunities influenced the development in which the sample of rural women was engaged. Those processes and opportunities contributed to their achievements and aspirations.

In the capability paradigm where development is freedom, that freedom 'involves both the processes that allow freedom of actions and decisions, and the actual opportunities that people have, given their personal and social circumstances' (Sen 1999:17). The focus here is on both processes and opportunities. Inadequate and adequate processes and opportunities influenced development. Some key procedures and opportunities

regarding development are outlined below, beginning with those identified in the data collected from the staff members and the World Bank representative of REDI and ending with the perspective of the sample of rural women.

Within the capability paradigm strong emphasis is placed on the perspectives of individuals and groups about their lived experiences partly because therein lies vital linkages to their development as well as their deprivation (Matthews 2017, Mazigo 2017). Expressions of their perspectives also provide them with opportunities to critically reflect on their realities as individuals and groups – such a process is fundamental to transformation and innovation (Chiappero-Martinetti et al. 2017).

In order to condense the data the perspectives of the World Bank and REDI staff members were merged and referred to as the project management team, while the sample of rural women was referred to as participatory consumers' perspective. Inadequate and adequate procedures and opportunities were identified and categorised starting with the management team perspective and ends with the participatory consumer perspective.

7.8.3.1 Management team perspective: Processes and opportunities

Inadequate processes. Multiple inadequate procedures at the macro level that influenced the process of development were identified through analysis of the data from the management team. The analysis revealed that reference was made mainly to the REDI project, gendered identities, and quality of resources and facilities in rural communities as factors influencing the process of development. Table 7.10 consists of key inadequate processes in relation to the generation of income, operation of the rural enterprises, operation of the project management team and the monitoring and evaluation of the REDI project. What is interesting about the data in this table is that most of the inadequate procedures uncovered from the dataset related to the operation of the management team and the monitoring and evaluation. One of the more striking results to emerge from the data was the influence of culture as a common factor in the practice of most inadequate procedures.

For example, the management team identified two inadequate practices that were influenced by organisational culture at the level of the management team. It was believed that the common global practice of the World Bank to conduct project evaluations at the time of project completion was premature and such a practice has the potential to obscure the full impact of investments such as the REDI project. Members of the team believed that an evaluation conducted at least five years after project completion would be more effective and beneficial. Secondly, they observed that there was a sense of aversion towards performance monitoring and evaluation that permeated the operations of the Jamaica Social Investment Fund (JSIF). JSIF was the implementing agency of the government for the REDI project.

Table 7.9: Inadequate Processes at the macro level which influenced the process of development

Macro Level	Inadequate Procedure
Income generation	- Several years after the start-up of the enterprises many have not used their assets as collateral to access additional financial services, which has the potential of generating more income and achieving financial independence - Low production - Balancing income generation and household responsibilities
Operation of enterprise	- Facilities operated without adequate adherence to national and international food safety regulations
Operation of project management team	- Slow pace of implementation - Low rate of completion for subprojects - High levels of bureaucracy within JSIF - Understaffed project team coupled with inefficient bureaucracy at JSIF made it problematic to respond to the immediate needs of some beneficiaries
Monitoring and evaluation	- Ambiguous monitoring indicators - Some levels of subproject impact were overlooked during monitoring and evaluation - Premature evaluation of subprojects obscured the full impact of the investment of the REDI project

Emergent from the data analysis was another interesting finding regarding inadequate procedure and culture – the common practice of rural women having to balance income generating and domestic responsibilities. The data revealed that women were generally responsible for the welfare of the family. Through detailed content analysis, it was

uncovered that most women were unable to effectively fulfil both their breadwinner and homemaker roles at the same time. Analysis of the data indicated that most of their efforts were thwarted by lack of facilities and services as well as limited economic opportunities. The management team noted some of the challenges and trade-offs associated with the practice of balancing both their breadwinner and homemaker roles:

> *Most times they are at home, depending on the male or they may try a little hustling. Some will do farming but you always find that those who do the farming and if they are vendors as well, sometimes the farm suffers if they don't have a male around… If you do chose to do certain types of jobs that you are able to get outside of the community, you either have to relocate or you have to spend a lot of money to get there and so based on the fact that you can't get a high-paying job, you get a low paying job and you kind of have to do a trade-off – for some, they stay in the community and then they get stuck. So just the lack of economic opportunities – other viable economic alternatives to farming or other low-skill work – they don't have a lot of options – it's just not available to rural women.* – Management team

Inadequate opportunities. Emergent from the data analysis were inadequate opportunities at the macro level in three main categories, national, community and institution, as noted in Table 7.11. These inadequate opportunities appeared to be systemic. A closer examination of the data in Table 7.11 uncovered that the process of development was arrested by policy, institutional and procedural inadequacies at all levels. Data analysis indicated that limitations at the community and regional levels and institutional inadequacies accounted for most of the deprivation of substantive opportunities.

Inadequate amenities at the regional and community levels were frequently mentioned by the management team as a key factor that has arrested personal and business development. For example, the team highlighted some of the barriers to development caused by limited access to water, electricity and communication services:

> *Access to water and access to light [electricity] are challenges, both personally for them as well as for any business or enterprise that they would want to engage in… One of the groups that we are working with right now – in South Trelawney – one of the main issues they are having in terms of being able to do business and do their marketing, is their lack of access to internet services as well as telephone – reliable telephone service, because of where they are located. In fact, all our groups have that problem… The land-line service down there is unreliable… A lack of these amenities must restrict them because if you don't have light, you can't have a fridge or freezer. You are limited to operate just during daylight hours – what kind of business are you*

going to do? And for the good student who is diligent he or she will study hard during the day but studying in candle-light is ruff [challenging]. – Management team

Table 7.10: Inadequate opportunities at the macro level that influenced the process of development

Macro level	Inadequate Opportunities
National	- Ambiguous policy directive for rural development - Disconnections between urban and rural regions in the areas of investment and production - High national debt - Limited effort on the part of the government in generating income - Institutional limitation that contributed to slow implementation of the REDI project
Community/regional	- Insufficient number of rural women in decision-making role in the community cooperatives - Insufficient job opportunities and educational institutions in rural communities - Limited access to healthcare services - Inadequate access to water, electricity, transportation, internet, communication facilities and services - Lack of both agriculture and non-agriculture income-generating initiatives - Limited recreational amenities - Insufficient community contribution - Limited access to financial services for rural community enterprises - Insufficient profit generated through fees for service by the community facilities - Inadequate and short-term plans for the sustainability of community enterprises

Institution	- Private sector institutions:
	  - High interest rates on services at financial institutions
	  - Limited investment in rural enterprises by the private sector
	- Public sector institutions:
	  - Limited institutional experience in the establishment of business enterprises was displayed by the JSIF
	  - Institutional reluctance on the part of the JSIF to consistently monitor performance against project plans
	  - Inadequate and ineffective project reports generated by the JSIF for monitoring the REDI project
	  - The project team was understaffed
	  - Slow implementation of subprojects by the JSIF
	  - Slow implementation could derail the provision of post-creation support and jeopardise the sustainability of rural enterprises

Overall, the perspective of the management team on inadequate processes and opportunities related mainly to the financial component of the valuable objects of the sample of rural women.

Adequate processes. Detailed content analysis uncovered from the data from the management team some adequate procedures of the development process of the REDI intervention. Adequacy of procedure in this context was based on the criteria that the process or practice promoted autonomous actions and decisions for the project participants, specifically, the sample of rural women. Table 7.12 presents a summary of those processes and practices in five areas, namely, income generation, operation of enterprise, operation of project management team, monitoring and evaluation, as well as psycho-social response. Four of those adequate processes identified were viewed as being central in enhancing freedom of choice for the project participants. They were the provision of training and technical support, accumulation of community contribution, collaboration during implementation and problem-solving and formalisation of the enterprises and community groups.

Table 7.11 Adequate Procedures at the macro level which influenced the process of development

Macro Level	Adequate Procedures
Income generation	- The objective to bring people in the poorest quintile into the formal economy with access to basic services was a key principle that guided the process of implementation for the REDI project - Personal and community contribution was matched by grant from the REDI project for the newly established community associations and cooperation which generally had limited assets and collaterals for their enterprises - Access to community facilities contributed to the women selling their products at a higher price and better quality - Through the REDI project micro and small producers were linked to formal markets, which helped to transform their approach to business and elevated their income - Connection to the REDI project influenced members of the community associations and cooperation by increasing their income - Successful enterprises generally record a loss during the first few years after start-up because of investments in research and development, acquisition of assets and marketing
Operation of enterprise	- Retraining and technical support were provided by the REDI project to assist in the operation of the enterprises - The REDI project introduced the project participants to a new way of doing business by formalising their enterprise - Community facilities were operated by community members and used a fee-for-service (FFS) payment model - Problem-solving was generally underpinned by collaboration - Cultural investments required proper book-keeping, on-going government support, transparency as to what the money was used for and how much money was being generated by these initiatives

Operation of project management team	- Collaboration between investment borrower (Government of Jamaica) and donor (World Bank) minimised associated risks during some cases of scope creep - Some efforts were made to provide pre and post-creation support for the enterprises. It is imperative to have post-creation support for a sufficient duration when implementing projects like REDI (new income-generating enterprises) to the type of beneficiaries (low literacy, limited resources and limited access to basic services) - Development policies and programs in the tourism and agriculture sectors should promote infrastructure and community development in rural areas because they have the potential to benefit more Jamaicans and better contribute to shared prosperity - The REDI project contributed to some cultural investments that need ongoing financial support from the government
Monitoring and evaluation	- Personal and community contribution served as an indicator of the capacity of the community enterprises - Effective impact evaluation should include these two activities - establish the baseline data at the proposal stage and measure the impact on income at different levels of the enterprise - Effective evaluation must be time-bound, in that, it should be conducted at specific time during the project life, such as at the start (proposal phase), mid-term and then at the end - To minimise the problem of results aggregation in an evaluation, the income should be measured both at the level of the enterprise and at the level of the individual coop members - Impact evaluation must acknowledge the differences between cultural or social investment and monetary investment and measure them differently - Social and cultural impacts are important in the assessment of the REDI subprojects - An effective evaluation of the REDI enterprises should include an assessment of returns on investment, sustainability, profit allocation for asset maintenance as well as achievement of objectives within the specified timeframe - Impact evaluation, of long-term projects like REDI, is generally more adequate and reliable if conducted five years post-implementation
Psycho-social response	- Personal and community contribution added to the grant funding had a positive effect on the commitment of the beneficiaries - Cultural investments may not be profit-generating but they are beneficial to maintain the Jamaican culture, document the history of its people and pass it down to the coming generations - REDI contributed to an improvement in the quality of service delivery in rural communities which has helped to enhance the quality of life of rural women and men in various communities - JSIF's approach to rural enterprise development has brought rural residents to a higher level of business formality which has been transformational

First, the provision of retraining and technical support was identified by the management team as the strategy that had the greatest positive effect on the project participants. In the operation of the new enterprises, retraining and technical support

appeared to have been essential. Data analysis revealed that through these methods of learning the project participants were active partners in the process of development, alongside the staff members of the REDI project. Analysis also uncovered that the knowledge gained through these methods of learning was autonomously applied to other personal, social and economic opportunities, as noted by a participant in the Prospect community:

> *The training benefits me in my personal business – farming and poultry rearing… Yes – because it showed me where I can put in a little more work and better manage my time. I learnt time management and business management… For example I have a farmer who helps me with weeding and I learned how to check the amount of time somebody works for me and what to pay them, as well as how to check my income and expenses and to pay myself.* – 47-year-old mother of 4 children, care-giver and subsistence farmer

Additionally, during the implementation process of the REDI project there was a strong emphasis on pre and post-creation support. This method of learning fostered collaboration in problem-solving between the management team and the project participants.

Second, the process of accumulating the community contribution depended greatly on their creative sourcing of resources through personal, family and community connections. It also had a positive effect on the sense of ownership and commitment of the project participants, especially those who actively participated in that process. The creative activities and psycho-social responses were strongly influenced by the independent actions and decisions, as well as personal and social environment of the project participants, as noted by members of the Maggotty community focus group:

> *Giving our 20% helped us to be more responsible, as we put effort and energy into doing our part; we therefore had a vested interest in what we were doing. Contributing to the work was very necessary. Our contribution was split in 10% cash and 10% labour. We had members in the society who assisted in providing the cash contribution so we pooled our monies together as we didn't have a lot of savings put aside… We worked out the labour contribution by calculating the pay of a labourer… Everything was then added up including the day to day activities that we performed. It came up to a tidy sum as well. The community contribution overall was very important. When people help to build something, they feel it belongs to them and they therefore take care of it, show more dedication to it, and they work harder to see it grow and also to maintain it.* – Maggotty community focus group (men)

Third, collaboration was a common practice throughout the implementation of the REDI intervention that enhanced the development process. Detailed content analysis of the discussions from the research participants indicated that it represented public-private partnership between the management team, project participants and other groups and organisations. For example, the operation of the enterprises was managed by community members with periodic feedback and support from the management team. This approach functioned as on-the-job training and fostered a collaborative approach to problem-solving, as both teams learned from each other. Frequently mentioned throughout the dataset, by the management team and project participants, was the important role of feedback and 'hand-holding' in the development of the participants and enterprises. The analysis found that the management team had to devise innovative 'hand-holding' strategies to address challenges faced by the project participants, ranging from limited communication services, lack of knowledge of food safety standards, low literacy, risk-aversion and fear of the requirements of entering the formal market, among others.

Fourth, the analysis uncovered that the procedures for formalisation of the enterprises and community groups were both challenging and rewarding. The majority of project participants who were interviewed made mentioned of fear or uncertainty with regards to the operation of the enterprises regarding the formalisation strategies. Interestingly, the analysis found that some project participants sought their own markets to sell their produce. While for others, the REDI staff members identified marketing opportunities for them which helped to stimulate autonomous actions and through their own efforts they have sustained those markets and expanded to others.

Adequate opportunity. Analysis of the data from the management team identified limited opportunities for the process of development in connection with the REDI project. Adequacy was assessed by the availability of an opportunity, in that, the project participants were able to access that opportunity without being hindered by their personal and social circumstances. The actual opportunities and themes identified in the responses from the management team are presented in Table 7.13. It is apparent from this table that very few opportunities were available to the project participants apart from those connected to the REDI intervention. Closer inspection of the data in Table 7.13 shows that the real opportunities, in all components at the macro level,

related mainly to the material and economic component of the valuable objects of the rural women.

Table 7.12 Adequate opportunities at the macro level which influenced the development process

Macro level	Adequate Opportunities
National	- Grant and technical support provided by the Government of Jamaica through the REDI project
Community	- Community contribution - Formally established community associations and cooperation - Perception of personal safety - Freedom of movement within communities

Institution	- Private sector institutions:
	  - Public-private partnership in the tourism sector in rural communities
	- Public sector institutions:
	  - Collaboration and support from JSIF and other government agencies

7.8.4 Participatory consumers' perspective: Processes and opportunities

The processes and opportunities that emerged from the analysis were based on the actual experiences of the sample of rural women. This suggests that they were different from those retrieved from management team data, which appeared mainly as proposals and intentions.

Table 7.13 Frequency distribution of opportunities for the sample of rural women

		Responses		Percent of Cases
		N	Percent	
Opportunities [a]	Bank	1	0.4%	1.6%
	Neighbour	4	1.7%	6.6%
	Government agency	19	8.3%	31.1%
	Relative	34	14.8%	55.7%
	Partner	40	17.4%	65.6%
	God	50	21.7%	82.0%
	Friends	24	10.4%	39.3%
	Self	58	25.2%	95.1%
Total			100.0%	

a. Dichotomy group tabulated at value 1.

The sample of rural women were asked to identify how they were supported to pursue their main capabilities, as an approach to recognise the real opportunities that they

have and how accessible those opportunities were to the entire sample, given their priorities and social circumstances. The participants revealed that they have used multiple opportunities in pursuit of their various capabilities. Of those opportunities, Table 7.14 illustrates that 95.1% of the respondents selected having to depend on themselves, 82% selected God as a real opportunity and 65% noted that they were able to access support from their partners as opportunity to pursue their capabilities. These percentages are non-cumulative, as respondents were allowed to select multiple opportunities. The distribution of the selection of the eight opportunities is illustrated in Figure 7.34, with *self*, *God* and *partner* as the top three opportunities. The least selected opportunity was *bank*.

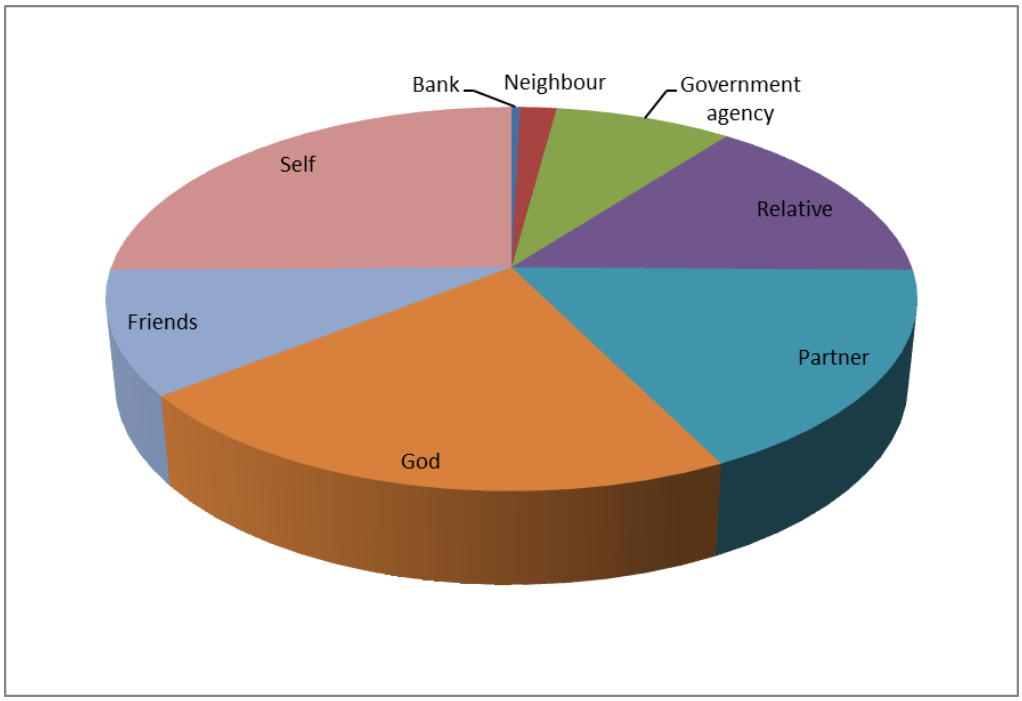


Figure 7.34 Distribution of opportunities for sample of rural women

The processes that allowed the sample of rural women to act and make decisions regarding their capabilities are related to the opportunities. As listed in Table 7.15, all the respondents selected the process of *building relationship*, 65.1% of them choose *pray and trust God*, and 57.1% selected *take care of self* as another process. These percentages are non-cumulative, as respondents were allowed to select multiple processes.

Table 7.14 Frequency distribution of the processes for the sample of rural women

		Responses		Percent of Cases
		N	Percent	
Processes [a]	Secure collateral	2	1.2%	3.2%
	Submit proposal	14	8.2%	22.2%
	Build relationship	63	37.1%	100.0%
	Participate in community group	4	2.4%	6.3%
	Use savings/asset	10	5.9%	15.9%
	Take care of self	36	21.2%	57.1%
	Pray and trust God	41	24.1%	65.1%
Total		170	100.0%	269.8%

a. Dichotomy group tabulated at value 1.

Figure 7.35 illustrates the distribution of the seven processes, and shows that *building relationship*, *taking care of self* and *pray and trust God* were the top three processes selected by the respondents. The least selected process was *secure collateral* and it relates to accessing financial services.

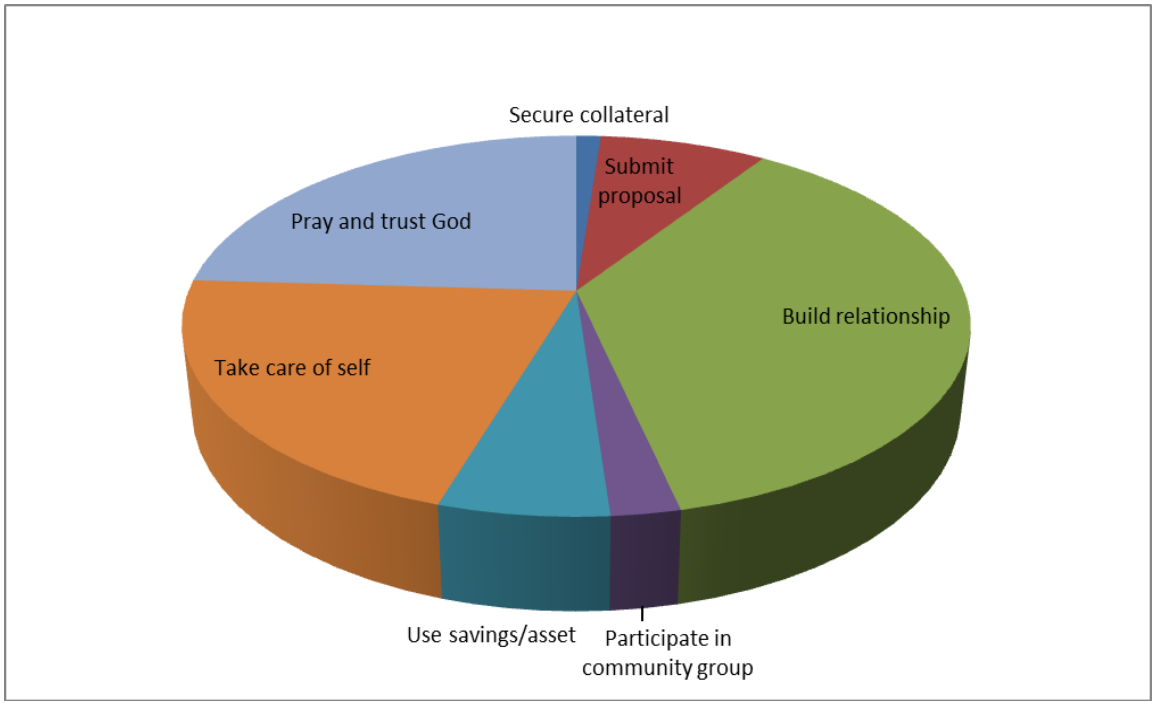


Figure 7.35 Distribution of processes for sample of rural women

7.9 Summary

In this section, the findings related to the diverse perspectives on development for the sample of rural women were presented. The findings were presented in three aspects of development, namely valuable objects, processes and opportunities. Valuable objects were drawn from three different perspectives, World Bank representative, REDI staff members and the sample of rural women. Convergence was observed regarding the perspectives on valuable objects, with access to healthcare, education, income and resilience emerged from all three groups. Valuable objects as achievements and aspirations were found only from data from the sample of rural women.

Quantitative data analysis was used to rank the four main dimensions of capability. It revealed that investment in children was the most important economic capability for the research participants. On average, each woman spent US$225 per month on childcare and seven hours per day. Of the total participants 30% of them receive US$125 on average from their children. The most important social capability was having a relationship with one's children. The main psychological capability was being independent while having good bodily health was the core physical capability.

Inadequate processes related to organisational culture impacted the development process; while inadequate amenities at the regional and community levels were found to have influenced inadequate opportunities. The provision of training, technical support and accumulation of community contribution emerged as beneficial processes for the sample of rural women. Participation in REDI stood out as the main opportunity.

Based on experiences building relationships, praying and trusting God as well as self-care were the main processes for the sample of rural women and their adequate opportunities were mainly through relationships, specifically by depending on themselves, God and their partners.

The following discussion chapter will elaborate on these and other findings within the context of the literature review. The research objectives will structure the discussion. The main aim of the discussion is to ensure that the objectives have been achieved.

Chapter 8. Discussion, Policy Implications and Conclusion

8.1 Introduction

This chapter concludes the thesis by first restating the main research question and objectives. This is followed by a synthesis of the literature review, theoretical perspectives, case study and methodological framework. It provides a detailed discussion, including the meaning and significance, of key research findings presented in the previous Chapter 7, with reference to each of the four sub-questions. The outcomes of this study are also discussed in relation to findings and claims of previous research studies. The first section, that is Section 8.7.1, explains the definitions of poverty, according to the experiences and perceptions of rural women and men, in the forms of material, social, psychological and physical dimensions of poverty. Connections observed within and across material, social, psychological and physical dimensions of poverty are then discussed in Section 8.7.2. In Section 8.7.3, the impact of the Rural Economic Development Initiative Project (REDI) is considered in relation to the four dimensions of poverty as experienced by the sample of rural women. The next section (8.7.4) presents diverse perspectives of development from the viewpoints of a sample of World Bank representatives, REDI staff members and rural women.

The last section of this chapter presents a summary of the key findings of the research, followed by a consideration of policy implications in relation to poverty, rural women and development in Jamaica. Reference is made to the National Policy for Gender Equality and the Vision 2030 Jamaica - National Development Plan. The limitations of the study are assessed subsequently followed by recommendations for further research. The chapter ends with some concluding comments.

8.2 Research question and objectives

This study was guided by the overarching question of whether poverty alleviation strategies of the Government of Jamaica have been effective in positively transforming the lives of poor rural women. To answer this question an attempt was made to fulfil the following four objectives. They were to: (1) provide an understanding of poverty based on the experiences and perceptions of rural women in Jamaica; (2) examine the

relationships between material, physical, social and psychological dimensions of poverty; (3) evaluate the impact of the Rural Economic Development Initiative (REDI) project on a sample of rural women; and (4) critically review the valuable objects as well as the processes and opportunities for development of the sample of rural women in Jamaica.

8.3 Current knowledge on poverty, development and rural women

It is a long-held belief that the intentions of a government are generally to function in a manner that benefits its citizens. The Government of Jamaica (GOJ) explicitly outlined this intention concerning poverty, development and rural women in several policy directives, including the National Policy for Gender Equality and Vision 2030 Jamaica – National Development Plan. A consensus-based methodology underpins these policy directives. However, current knowledge about poverty and development in Jamaica is guided mainly by a methodology based on income and consumption. This approach has provided information about the economic, social, structural and environmental factors affecting the Jamaican population.

Yet the general population continues to be characterised by high levels of poverty along with sectors that are pregnant with potential but stagnated by underdevelopment. Rural citizens, especially, are predominantly affected by persistent poverty, especially women, children and the elderly. In spite of the recognition of multiple dimensions of poverty, the GOJ continues to evaluate only the income and consumption aspects of poverty. It is such limited knowledge about the quality of life of the Jamaican people that the GOJ mainly uses to guide the formulation of development policies, programs and projects. Evidence of persistent poverty in rural Jamaica indicates that current development strategies have been relatively ineffective in addressing rural poverty. Furthermore, an assessment of the quality of life of rural women, which is one of the groups in the poorest quintiles, revealed several paradoxes about their quality of life and the current development priorities.

Therefore, it is believed that the GOJ has a narrow understanding of the poverty experienced by rural women and evidence suggests that the GOJ and this group of citizens are pursuing diverse development goals. Divergence, contradictions and limited understanding at this level of government-citizenship relationship makes the

policy cycle highly unproductive and can breed mistrust between both partners, resulting in the intentions of the government appearing to be illegitimate. Given these concerns, this thesis then sought to provide an in-depth knowledge on the poverty and development of rural women in Jamaica. It is anticipated that the findings of this study will contribute to a broader definition of the problem of poverty and influence national debates on transformative development trajectories.

8.4 Defining poverty

In putting forward a broader definition of poverty, the capability approach emphasises three key factors. First, there should be greater inclusion of the poor themselves in defining their poverty; second, effort should be made to expand the dimensions of poverty with the aim of having as close as possible a holistic view of their condition. Third, it is believed that knowledge of the relationships between the dimensions of poverty can help to demystify some of the complexities of defining poverty. Poverty is one of the most debilitating human conditions and although people living in poverty do their best to survive in that condition, it is a fact that their ultimate need and desire is to change their situation by getting out of poverty. Development is generally put forward as the solution to help the poor change their conditions of deprivation.

8.5 Theoretical perspective on development

Equipped with an understanding of the capability approach in comparison to the income and consumption development framework, this study employed the former. The selection of the capability approach as the theoretical framework was justified because of its broader conceptualisation of human being, and especially the beings of poor humans. The capability approach encompasses both monetary and non-monetary aspects of well-being; it takes into consideration human diversity; and attention is given to what people value and the reasoning behind their priorities. The non-monetary and diversity factors of human well-being are generally outside the scope of the income and consumption development framework. Development processes that take into consideration the specific social and personal contexts of individuals, tangible and intangible resources and the priorities of the poor are viewed as transformative.

8.6 Methodology

To provide a rich description of the poverty and development experienced by rural women, this study employed some scientific techniques and tools. Over a six-month period (August 2014 – January 2015) a combination of in-depth interview, focus group, participant observation and a questionnaire survey were used to explore the phenomena of poverty and development. Fieldwork for this exploratory study was conducted in six rural communities in Jamaica. Data on these phenomena were collected from a sample of 93 research participants who were rural women and men, project staff members and representative of the World Bank. Data collected were analysed with the assistance of the computer data analysis programs of NVivo and SPSS, and several findings were uncovered.

8.7 Discussion of findings

8.7.1 Defining poverty through the lens of rural women

The first objective was to provide an understanding of poverty based on the experiences and perceptions of rural women in Jamaica. Poverty is generally referred to by policy-makers, often examined by researchers and always experienced by the beholder. Persistent poverty makes the perspective of the beholder potent and reliable (Narayan 1999, Tucker et al. 2011). This section discusses an examination of poverty through the lens of rural women and men in Jamaica.

Content and thematic analyses of the qualitative data indicated that the material dimension of poverty was the most common aspect of their deprivation. Participants in all five communities self-reported experiences of material poverty. Thematic analysis revealed that material poverty was experienced as insufficient income, unemployment and underemployment, insufficient food, limited access to utility and facility, inadequate housing, underutilised and insufficient resource, inadequate clothing and inability to pay bills. Through content analysis insufficient income, unemployment and underemployment as well as insufficient food were observed as predominant indicators. The indicator of material poverty that appeared as the least experienced by the participants was inability to pay bills. Further analysis indicated that participants in the Prospect community self-reported the least incidences of material poverty; while those in the communities of Bath and Maggotty self-reported more experiences of material poverty.

For the social dimension of poverty, analysis of the data suggested that dependence, abusive relationship and neglect were the most common indicators. Lack of recognition seemed to have been one of the indicators that was least identified by the participants. Participants in the Treasure Beach community discussed most of the indicators of social poverty in comparison to the other communities.

Data analysis indicated that self-reported depression, unhappiness along with embarrassment and shame were the most common indicators of the psychological dimension of poverty, and conversely, fatalism was identified by a relatively small number of participants. References to psychological indicators of poverty were provided mainly by the Treasure Beach participants.

Regarding the physical dimension of poverty, low levels of formal education and poor bodily health were the dominant indicators, while low skills set was hardly identified by the sample of participants. Participants in the community of Treasure Beach self-reported more experiences of physical poverty.

Together these findings indicate that the sample of rural women experienced multiple forms of poverty. Content analysis provided evidence of material, social, psychological and physical poverty in varying levels across the communities. These dimensions of poverty are like those found in an earlier study by Narayan and co-authors (2000), which depended extensively on the perspectives of the poor in 47 countries. This World Bank supported study revealed significant information about the non-material dimensions of poverty, specifically the social and psychological. The presence of non-material and material poverty evidence indicates that the overall experience of poverty for the participants was intense. This intensity was justified by findings of multiple forms of poverty at the personal, community and national levels. For example, participants in the Bath community discussed experiences of material poverty in the form of lack of money, insufficient food and inadequate housing at the personal level; they also mentioned psychological poverty of fear and uncertainty at the personal level and associated it with social poverty at the community level in the form of praedial larceny. Furthermore, at the national level they reported experiences of being neglected by a state agency.

Intergenerational poverty intensified the poverty experienced by some of the women, as observed in Maggotty and Treasure Beach. In the case of the participants in Maggotty, one mother self-reported low levels of education (physical poverty), insufficient income and inadequate housing (material poverty) and the daughter who was an adult also mentioned the same three indicators of poverty. References to inadequate housing and low levels of education were verified through participant observation. A tendency of downward adaptation, where one adjusts one's desires and expectations to meeting subsistence needs (Sen 1999), was observed through statements from the mother and daughter. When they were asked to judge the quality of their life now compared to five years ago the mother stated, *'I'm better off…because I'm planting my little peanut and raising my little chicken…so I can help myself, so I'm better off – I'm not 100% but at the same time I can help myself.'* In a similar vein, the daughter responded, *'I'm a little bit better because I can find myself something to eat and I have somewhere to sleep.'* This adjustment to 'what they unambitiously see as feasible' seems to be debilitating (Sen 1999, 63).

The behavioural responses of the project participants in Maggotty alluded to the incapacitating characteristics of downward adaptation. The mother and daughter who were aware that they were not living the good quality of life that they had desired were somewhat nonchalant about the operation of their REDI subproject. This was evident in their lack of awareness of the status of the project. Even though they acknowledged that they could earn money from working at the pig-rearing facility, when asked how often they worked at the facility they were unable to clearly state their working hours or the last time they had worked there. They then stated their reasons for low participation in the REDI project, which were related to time constraint and the low income offered by the project. According to the mother, *'I'm not going down there because I'm supposed to reap my peanut this month and it has a lot of grass so I have to [spend my time] over there pulling out the grass so I'm not going down there this week.'* The daughter acknowledged that she has not worked there for the past two weeks and states, *'it is just hand-to-mouth'* – referring to the income received as being insufficient.

Although Sen (1999, 62) expresses caution against the use of 'mental conditioning and adaptive attitude' in assessing poverty, it is mentioned here because the participants employed it in judging their quality of life. Additionally, these findings lend support to Austin's (2015) conclusion that downward adaptation had a role in the valuation made by a sample of people in Britain regarding the impact of economic crisis.

At the theoretical level, these findings corroborate the negative association between adaptation and the process of development discussed by Lewis (1955) in his seminal book *Theory of Economic Growth*. He theorises that adaptation can negatively influence economic development. That is because adaptation is basically freedom of choice in a restricted context; it is this context in which coping strategies are sometimes selected (Sartain 1973, Bernstein et al. 2012). Coping strategies are mainly to survive a condition and not necessarily to change it. Lewis (1955, 430-31) recognises that the survival mode, if engaged for too long, can become problematic to development because those living in chronic poverty developed a 'taste' for a low quality of life. Lewis' (1955) pioneering work illuminated the debilitating impact left on societies by such a 'taste'. Although the focus of his work was not to examine that 'taste', it provided knowledge of the challenges of achieving economic development in the context of persistent poverty as it relates to the transformation from old 'taste' to acquiring new 'taste'. He acknowledges that there are tensions in the transformation process when moving from a state of poverty:

> *We demand the abolition of poverty, illiteracy and disease, but we cling desperately to the beliefs, habits and social arrangements which we like, even when these are the very cause of the poverty which we deplore* (Lewis 1955, 430).

Yet still he argues that 'painful transitions are inherent in the transformation of a society from one way of life to another' (Lewis 1955, 433). That transition, he notes, must take place at the individual, regional and national levels.

However, Lewis' (1955) explanation of the transition from the old 'taste' to the new 'taste' was generally at the national or global level. The capability approach is suitable for the individual level. The capability approach implies a similar tension in choices and values but recommends a more covert approach to the development process.

Conversely, Lewis (1955, 430) discusses the old and new tastes as being dichotomous which therefore require a complete change from the old to the 'new beliefs, habits and institutions.' However, the capability approach acknowledges that the old 'taste' is not all demeaning because individuals used their freedom and creativity to develop that 'taste'. The approach implies that there is some value in the 'taste' or way of life. Hence the capability approach recommends an in-depth examination at the individual level to evaluate the way of life to identify what the poor value and why they value what they value within their local context. This theoretical debate between Lewis (1955) and Sen (1999) suggests three aspects of poverty that should be taken into consideration when defining the concept. First, it was observed that a lot more is revealed about the nature of poverty at the individual level; second, adaptation is a continuous process in the context of chronic poverty; and third, there is a close connection between psychological poverty and economic poverty.

8.7.2 Tapestry of poverty

Detailed content analysis suggested that unemployment and underemployment, poor bodily health, abusive relationship and praedial larceny led to insufficient income. On the other hand, insufficient income caused dependence, low levels of formal education, inability to pay bills, inadequate clothing and insufficient food.

According to the experiences of poverty for the sample of rural women, dependence led to discouragement. This finding indicated how social poverty can aggravate psychological poverty. Dependence was reinforced by multiple forms of deprivation – namely, neglect, inadequate housing, insufficient income, insufficient food, unemployment and underemployment. These findings reveal the formation of dependence in the lives of the research participants.

It was found that self-reported depression was caused by neglect, poor bodily health, abusive relationship, as well as limited access to utility and facility. Those correlations indicated the direct influence of social, material and physical poverty on psychological poverty. Furthermore, the findings indicated that self-reported depression caused feelings of unhappiness.

Included in the findings were a positive correlation between insufficient income and low levels of formal education. It was also uncovered that low levels of formal education led to social exclusion, embarrassment and shame as well as unemployment and underemployment. These causal relationships indicated how physical poverty aggravated social, psychological and material poverty.

Overall, the findings on relationships within and across dimensions of poverty suggested that based on the lived realities and perceptions of rural women, the structure of poverty was predominantly influenced by unemployment and underemployment, abusive relationship, low levels of formal education, mental myopia as well as embarrassment and shame. Although other connections were identified, these interrelationships were cogent in revealing the intensity of their poverty as well as how strong and far-reaching was the poverty that they had experienced.

The examination of two-way relationships within and across dimensions revealed that some indicators were interrelated to several material indicators as well as linked to numerous social, psychological and physical indicators of poverty. These findings suggest that in the context of multiple deprivations, some forms of poverty generate, aggravate and compound other forms of poverty.

A concentration on the relationships within and across dimensions of poverty provided findings that are consistent with the inter-locking relationships of poverty found in *Voices of the Poor* (Narayan et al. 1999). These outcomes further support key findings which emanated from the 1999 Poverty and Social Survey of Britain such as the strong connection between insufficient income and lack of adequate clothing along with insufficient food. Additionally, as observed by Gordon and co-authors (2000), it was also observed that there are other factors apart from lack of income which influence the structure of poverty. Furthermore, like Gordon et al. (2000), a similar claim can be made that an increase in income alone will not eradicate poverty from the lives of the sample of rural women, partly because of other endogenous factors.

From the experiences of most of the rural women in the sample, other endogenous factors found to contribute to their poverty were lack of institutions and facilities. This was most evident in the case of the participants in Mango Valley who bemoaned the

lack of educational and skills training institutions in their community. They compared evidence of social, material and psychological poverty in the absence of skills training and educational facilities as they recalled earlier expansion of associated capabilities which resulted from the operation of a skills training facility. Study participants recalled that a skills training facility operated in the community from 1997 to 2009, which was the product of almost 30 years of community advocacy, personal sacrifices and collaboration with other adjoining communities and organisations. Its closure resulted in expressions of sadness and distress. The rural women of the Mango Valley community group lamented:

> *… It pains my heart when I looked at all the books (I don't even like to remember it) that came from Food for the Poor… When I looked at the books in the rubbish – heaped and burnt and some of them wet… It grieves my heart, I don't like to talk about it… The people [community members] quarreled about it day and night. I feel bad, really bad, it's [closure of the community centre] like a family that is dead and especially the books are like my children and my good community friends…* – Mango Valley community focus group

Other indicators that were indirectly related to insufficient income also contributed to the tapestry of poverty. Material indicators such as underutilised and insufficient resource along with limited access to utility and facility, social indicators such as neglect, social exclusion, abusive relationship and lack of recognition all had very weak connections with insufficient income or its closely related indicators of unemployment and underemployment. Furthermore, no direct relationship was found between insufficient income and laziness, mental myopia as well as with embarrassment and shame, which are psychological indicators of poverty. Lack of participation in productive activity, which is an indicator of physical poverty, was seldom associated with insufficient income. Additionally, several cases in the communities of Mango Valley, Maggotty and Treasure Beach revealed that having educational qualifications did not contribute to access to employment.

Another important finding was that reproductive functionings were strong determinants of the productive activities in which the participants were engaged. Caregiving roles and responsibilities appeared to have been key aspects of their lives which influenced job selection for the sample of rural women in all five communities, as expressed below:

Sometimes I do the hotel programme, so sometimes I do work… [But] sometimes you can't leave your family, especially when you have girl-child, not because you want the money – you have to respect your family. – 42-year-old mother of four children, caregiver and personal service worker (seasonal) in Maggotty

…Some members left the farm for better options and because we had stopped receiving the stipend [from the government] …. A lot of us here like the farming, so we continued farming and at the same time we have children to send to school so we mostly take-home produces and vegetables to cook so that we don't have to go to the market and spend that extra money… – Bath community focus group

I struggle a lot because I don't work and I have two children… one [has a baby] (pause) but I am still responsible for her because if she is hungry I still have to fret the same way and the other one going to school – 53-year-old mother of two children, grandmother, caregiver and unemployed in Treasure Beach

I work hard to send my children to school. If I were to have the cash I spend to send them to school a trailer would not be able to draw that money. – 54-year-old mother of three children, caregiver and subsistence farmer in Prospect

…When school is in session I would be at school selling things and during the holidays I'm at home with my kids… – 42-year-old mother of three children, caregiver and unemployed in Mango Valley

These findings revealed a competitive yet restrictive relationship between productive and reproductive functionings. An inverse relationship was observed when the reproductive capabilities were viewed as agency goals and the productive functionings were viewed as aspects of well-being. Specifically, the sample of rural women endured long periods of unemployment, insecure and low-paying jobs, financial insecurity and psychological pressure mainly to fulfil childrearing obligations. These findings indicate that most of the rural women had multiple needs to address which reduced their capability to become profit maximisers. Analysis of the data revealed that they pursued income to first fulfil their reproductive obligations while they had limited opportunities to perform other valuable functionings, such as being able to increase one's income. This functioning appeared to be secondary. These findings confirmed a fundamental claim of the capability approach that some agency goals, such as being able to fulfil reproductive obligations, may be viewed as being more valuable than indicators of well-being, such as financial security(Sen 1985, 1999).

These findings mean that in the context of REDI, which supported a profit maximization approach to development, the outcomes might appear to be unsuccessful if assessed only in monetary values.

A possible explanation for this inverse relationship between the women's productive and reproductive functionings is that the high value they placed on their reproductive functionings came mainly from the sense of fulfilment and motivation they derived from their caregiving roles. The women were directed by their purpose of motherhood which they supported and validated through their productive functionings. Consequently, most of the sample of rural women slavishly pursued economic opportunities mainly to contribute to their life goal of being a mother. However, most of them had low skills and low levels of education but most critically they all had limited productive opportunities. Therefore, in their context of limited personal and productive choices, they seemed to have chosen the more rewarding functionings, those of their reproductive roles, but such choice further restricted their time and constrained their economic activities and financial resources. This was especially true for women in the sample who had infants, as well as children going to school and unemployed adult children living with them. The returns from such caregiving were often social and psychological rewards but often with no financial returns. This contributed to a depletion of their financial resources even as their social and psychological rewards increased. Similar findings regarding the connection between poverty and well-being were identified earlier by Mason (1985). However, unlike Mason (1985), whose research participants were from both urban and rural areas, these findings are specific to rural women in this study.

Yet, other findings revealed that the sample of rural women was heterogeneous in regarding the relationship between their productive and reproductive functionings. Hence, while most of the findings on this relationship shows a lack of financial returns for caregiving roles, other findings were that 30% of mothers with working adult children received on average US$125 during the month before field work; some received financial support from their male partners; still others without children participated in productive and educational functionings.

Overall, it was found that a tapestry of poverty formed a great part of the lived experiences of the sample of rural women. Interestingly, these findings provide further support for the hypothesis proposed by Lewis (1955), Beckford (1972) and Townsend (2010) that there is a relationship between psychological, social, physical and economic poverty. A significant contribution of these findings on the relationship across and within the dimensions of poverty was that they indicated the direction of these relationships. Like Hundeide (1999) who uses the direction of the relationships between the various dimensions of poverty to propose pathways to address deprivations for specific ethnic groups, the findings in this study can be used for the same purpose but at the level of the individual and for the specific sample of rural women in this study.

8.7.3 REDI and its impact on rural women

Overall, REDI had impacted the lives of rural women in the communities of Bath, Maggotty, Prospect and Treasure Beach in several dimensions. As intended, the project had a positive effect on the economic infrastructure, market access and employment opportunity of the project participants and their communities, albeit, in varying degrees.

8.7.3.1 Economic infrastructure development

At the community level, it was found that the REDI had contributed to infrastructural development in three of the four communities. In Bath, two greenhouses, a water pump and a storage container were provided. In Maggotty, community members participated in the construction of a pig-rearing facility and the case was the same for the community of Prospect. The intention of the improvement in economic infrastructure was to contribute to employment growth. However, this outcome was uneven across the communities. In Treasure Beach, where the focus was on market expansion, it was found that the community experienced a 100% increase in employment for the artists who manufactured items for the Treasure Hunt Craft Shop of the Treasure Beach Women's Group Benevolent Society (TBWG). In Maggotty and Prospect, employment increase was minimal with each having only one full-time worker along with three and five part-time workers, respectively. In Bath, there was no movement

in terms of employment. The same six female farmers who started the subproject remain after two years of implementation.

8.7.3.2 Access to established markets

One of the intended results of REDI was to increase access to markets for the community enterprises. Market expansion, was found to have occurred in three of the communities, except for Bath.

There are several possible explanations for the community of Bath being an exception regarding market expansion and employment opportunities. One such reason was the disease infestation which negatively affected the production of tomato and capsicum in both greenhouses. At the time of fieldwork, the participants had ceased production in the greenhouses. This incident had significantly reduced their ability to engage in any market since they had no product to sell and having low production does not necessitate an increase in workers. This connection between low production, lack of market access and stagnation in employment was not discussed in the other evaluations (Rhiney 2013, Abdulkadri 2013, Charlier 2017).

The general success trend of the other three community subprojects could partially be explained by three factors, namely, access to established markets, institutional support and ownership of the subproject by the community groups.

Having access to established markets that consistently absorb the products provides the producers with an opportunity to plan future development. This connection between established market access and future business development was made through detailed content analysis of data from participants in the communities of Maggotty, Prospect and Treasure Beach. For example, the Maggotty community focus group of men stated, *'we have the small jerk-shops that will take a pig or two from us as well, so the market is fairly good.'* The Prospect focus group of women and men noted, *'we have sold over $3 million worth of animals [pigs] already… All of that went back into the business… I would say I'm hoping that in the first six years we would be able to have some dividend.'* In Treasure Beach one participant while commenting on the improved marketing at the Treasure Hunt Craft Shop expressed, *'… A local guy [bee farmer] now*

he is given a place where he can sell that honey… He is encouraged to increase the production and find a nice new label…'

Earlier studies by Edwards (1980) and Simmonds (1987) found a similar pattern of an established market access for higglers, which was specific to the local markets. However, they also found that the development of this established marketing system was modest and accompanied by prohibitive regulations implemented by the local government. A later study by Stewart (2014) confirmed previous findings about the government's prohibitive regulations on the marketing system along with incremental improvements.

One interpretation of these earlier findings along with the findings of this current study is that the success trend identified regarding market access for the three subprojects of REDI might only be in the short-term. It can be further construed that the presence of an established market access is not a guarantee of future business development, although it appears that incremental development might be possible if underpinned by implementation of progressive legislations.

In the short-term however, it was found that an established market reduced time and psychological stress that would often accompany the search for markets; along with contributing to operational stability, which has had a multiplier effect on production. Thematic analysis of the subprojects provided some explanations for this finding. The multiplier effect of a stable market was evident in Maggotty, Prospect and Treasure Beach. Regarding reduction in time and psychological stress, participants in Maggotty stated that having a secured market reduced fear and time associated with the search for markets; the group in Bath acknowledged that hard work, which requires time and decision-making processes, was needed when they were seeking out markets; while a participant in Treasure Beach recognised that having a secured market was motivating. Similarly, Simmonds (1987) earlier argued that the established markets for higglering promoted social and psychological capabilities such as independent living, mobility and relative freedom especially for rural higglers who could access the markets in Kingston.

8.7.3.3 Adaptation through institutional support

One unanticipated finding was the effect of training on the project participants. Participants in all four communities could recognise the benefits of the training activities. The findings identified through detailed content analysis revealed that apart from high levels of satisfaction with the training, participants could relate how the training contributed to changes in their behaviour and business operations. It was found that participants in Bath applied the acquired knowledge and reaped the benefits of training in greenhouse production in the early phase of their subproject. Regarding financial accountability, they diligently sought the government-mandated three quotes before purchasing construction materials. In Maggotty, the participants discussed how they had learned through interactions with other groups. In Prospect, the findings revealed that accountability and transparency had been advanced in the operation of the pig rearing facility because of the record-keeping and business management training they had received.

It must be noted that even though adaptation is often discussed as a threat to development (St. Hill 2003, Austin 2015) in this study it appeared to be both downward adaptation and a positive form of learning. This claim is supported by evidence from the content analysis which reveals how research participants perceived REDI as an opportunity to readjust their desires and expectations, as well as to practice new ways of doing business. Adaptation as learning was found at two levels. Level-one-learning was the willingness to acquire new knowledge; and level-two-learning was the ability to convert new knowledge into practice, either in the operation of their subproject, additional businesses or personal life.

The following are some of the examples of level-one-learning that were found:

> *I have never seen so much food available for my choosing! I have never been to that parish or hotel before, I have never heard about it before. The greenhouse training was at Jamaica Grande – we enjoyed ourselves! I would want to go back there right now [the women laughing].* – Bath community group (women)

> *It makes me feel very good and although I am not able to attend all the meetings when I go I get to express myself, learn new things and interact with other people.* – 28-year-old mother of one child, pregnant, caregiver and personal service worker

For us the training period was very beneficial, in one instance, 5 of our members were taken to an all-inclusive hotel for a period of 5 days for training. Some of us have never experience this before; it was exciting and we had a good time (laugh)! – Maggotty community focus group (men)

Here are some examples of level-two-learning:

You get to meet new friends plus a lot of teaching from other groups because whenever we
interact with the other groups we learn a lot. I'm proud of it [the training] because we get a lot of exposure and sometimes when you don't really know how to use a push broom and when you go down to the other groups they would show us how to use the broom and shovel – Maggotty community focus group (women)

Sometimes we have meetings in school where we get the police from Peter Plains or Black River or wherever they come from to highlight to the women about different things like how to look after themselves and how to be independent… Those meetings opened my eyes to see the things that I was blind to, or didn't want to see. It did open my eyes… [For example] my husband and I, I use to have the clothes on the bed and do a lot of ironing and I use to say to myself I need to do the breakfast first before I start the ironing or I get up and do the breakfast first before I start washing but I said no if I am going to iron all of these shirts, he should be able to do the breakfast for both of us. – 62-year-old mother of two children and retired health worker

In terms of business development, the training has helped a whole lot… The training that we received – It's something you are able to branch off with… We even have a member who has now gone into a farm store… And even if you have your little business, like sometimes I raise chicken, and I never used to check how much feeding I was buying and when I went to the training, they told us that we must write down everything…and that we must pay ourselves. – Prospect community focus group (women and men)

At the individual level, the learning process undertaken by the project participants was part of the 'painful transition' alluded to by Lewis (1955, 433) as discussed in the previous section 8.7.1. He also put forward the idea that positive cognition processes can enable economic advancements.

We learn how to be more responsible for other grant funding. Learn how to be more accountable and better. It makes me feel proud; there is room for improvement but I love it. I feel so excited that I can do something. It helps me to try new things and meet new people and I can learn new things because I have a brain. REDI improved my little skills and prove that there is a skill in me that I was not using, so if I keep on trying I will become better. – 47-year-old mother of two children, caregiver and service manager

These illustrations of learning can be interpreted as expansion of their physical capability of having skills and practical knowledge. This expansion took place through the learning process of operant conditioning. In other words, the training acts as the new stimulus which was paired with an old stimulus, such as farming, creative art or business management. An increase in rewards from the training, whether monetary or non-monetary, acts as a stimulus, which contributes to improvement in the skills set and knowledge of the participants. This expanded capability was used by the participants in REDI for personal, social and economic development. As explained in Chapter 3, operant conditioning is a psychological learning process, which can be classified as self-improvement. Rhiney (2013) in an earlier evaluation highlighted the potential of REDI to build self-determination, which is a similar psychological capability. However, Rhiney (2013) did not propose the process by which self-determination would be enhanced.

8.7.3.4 Ownership of subprojects

Another unexpected finding was that community contribution and active participation strongly influenced ownership of enterprises among the REDI participants. While the intention for the required 20% community contribution was not explicit in the project proposal of REDI, this trend was found among the participants. This identified trend could add a valuable purpose to the project requirement of community contribution. Additionally, a trend of accommodating behavioural responses toward the sourcing of community contribution was uncovered. This trend was more common among participants who were informed of this requirement.

This behaviour was evident in all the four research sites that implemented REDI subprojects – Bath, Maggotty, Prospect and Treasure Beach. For example, in Bath, the women stated that after being made aware of this requirement, they began sourcing the money by pooling personal resources, borrowing cash from relatives and friends. Even though it was challenging they were still able to source the full 20% in cash and labour – totalling JA$1,990,000 or US$22,800 – which was the largest amount of community contribution among the four groups. A similar approach was undertaken by the Maggotty group who also had limited financial resources but could gather a total of

JA$1,638,000 or US$18,700. In Prospect, the approach was different, as community members were invited to become a cooperative society member by providing a contribution of JA$25,000 or US$290 in cash, which was then pooled as JA$1,540,000 or US$17,600 in community contribution. In Treasure Beach, it was found that a monetary value for the hosting of meetings and workshops for the artists and other relevant gathering was calculated and accounted for their community contribution of JA$650,000 or US$7,400.

The men in the Maggotty focus group added meaning to this valuable functioning of contributing to one's advancement:

> *Giving our 20% helped us to be more responsible, as we put effort and energy into doing our part. We therefore had a vested interest in what we were doing. Contributing to the work was very necessary… Overall, the community contribution or sweat equity was very important. When people help to build something they feel it belongs to them and they therefore take care of it, show more dedication to it, and they work harder to see it grow and also to maintain it.* – Maggotty community focus group (men)

This finding on the high levels of ownership displayed by project participants was consistent with Rhiney's (2013, 50) who found that of the 57 project participants in his midterm evaluation of REDI, 74% of them 'expressed a fairly strong ownership of their subprojects and actually have plans in place to either expand or diversify their product/service offerings.' However, Rhiney (2013) centred his discussion of this project outcome on the minor 20% of participants whom he found to have exhibited high levels of dependence on the implementing organisation. While such discussion was useful it crowded out the overwhelming evidence of an effective strategy of the REDI and an opportunity to make recommendations to expand this valuable capability of the rural population. This study will therefore make such recommendations in the concluding section of this chapter.

Evidence of high levels of ownership by project participants is critical for further expansion even though some poverty alleviation programs (Porter et al. 2012) assume that the resources required to improve the conditions of the poor are external to their environment. This finding provides evidence that the poor have resources that can contribute to their development and that of their communities, and being able to make

such a contribution was a valuable functioning for most of them. Furthermore, this finding supports Sen's (1999, 11) proposition that:

> *With adequate social [and economic] opportunities, individuals can effectively shape their own destiny and help each other. They need not be seen primarily as passive recipients of the benefits of cunning development programs.*

8.7.3.5 Participation as degrees of freedom

The above findings on community contribution underscore the significance of active participation of the poor in enhancing their quality of life. Varying degrees of participation was found among the project participants across and within the four communities. In the community of Bath, the women displayed what appeared to be high levels of participation despite experiencing several challenges. They experienced personal deprivation regarding limited economic opportunities and low levels of education; structural and financial deficit when they lost several crops of tomato and capsicum due to disease infestation; and they claimed that they were neglected by a government agency after they requested support to address the problem of disease infestation. The participants acknowledged their disappointment with the challenges but expressed a sense of resilience and commitment to their identity as female farmers. They stated, after outlining the challenges they encountered:

> *But because we are rural women and we love farming we won't let that [the problems with the REDI] cause us to stop along the way… We are just going to move on because we won't let that 'stifle' [restrain] our future because you can't 'quarrel over spilled milk'.*

However, their mental assessment of their situation is unreliable given the presence of both positive and negative responses (Sen 1999). Their behaviour towards their subproject was a more credible indicator of their participation. For example, it was found that during the August fieldwork the women were clearing the infested greenhouses as well as conducting outdoor farming at another location on the farm property. During the fieldwork in November it was observed that the greenhouses were cleared of all infested seedlings, and the women stated that they were making plans to resume greenhouse production. However, they stated that they needed additional help from RADA.

In Maggotty, evidence indicated that the men had more knowledge of the management and operation of the pig-rearing facility and appeared to be more involved than the women. While the men displayed what Arnstein (1969, 223) refers to as 'citizen control', the participation of the women closely resembled 'placation'. Arnstein (1969) ranked placation as being fifth or three levels down from citizen control on the ladder of citizen participation. She describes it as tokenism participation in which citizens lacked the freedom to share in decision-making, involvement is marginal to the management roles; they mainly represent a façade of high participation when number of participants is a criterion for effectiveness and accountability. However, limited attention is given to ensuring their greater involvement in the community initiative. This marginal participation in the actual decision-making processes could partially be attributed to their low levels of work in the implementation component. Another possible explanation for the low levels of work on the part of the female members could be time autonomy, wherein they decided how to allocate their time, with only a few hours allocated to the pig-rearing, as indicated by one of the women, *'I'm not going down there because I'm supposed to reap my peanuts this month.'*

Autonomy in time allocation was also observed among the women and men in Prospect, although findings revealed a modest level of shared decision-making and management functions. This was not the case in Treasure Beach, which had the largest membership, with some members being knowledgeable about the management and operation of the Treasure Hunt Craft Shop and the group. It was found that many of the members were unaware of its operations and a few of them recalled experiences of being excluded and disregarded.

Along with the above findings, the act of participation was found to have supported autonomy, competence and relatedness, which functioned as varying levels of psychological, social and physical capabilities.

Autonomy support: Rural women in this research were active participants in the development of themselves and their communities. The findings confirmed that the women autonomously made the decision to engage in the project. Participation was intrinsically motivated in most cases. Participation allowed rural women to make

decisions about their personal life and engage in the process of pursuing and achieving valuable goals. Participation was found to have facilitated increased confidence, boosted self-esteem and self-respect, and revived hope and aspirations. Improved levels of competence and self-governance which promoted autonomy for group members were found among the participants.

Competence support: It was found that participation functioned as a mediator between the poor quality of life they experienced in their community and fulfilment of some valuable life goals, such as being psychologically and financially independent and caring for their children. As discussed in 8.5.3.3, the training gave them new frames of reference in relation to income-generation, business, agriculture, group dynamics and what they were capable of doing and becoming. A process of transformation appears to have begun when the sample of rural women, driven by their intrinsic values willingly contributed to REDI's objectives because of shared values. The willingness of the women to participate in the project seemed to have stimulated freedom of learning and thinking while interacting with others. In this open environment of learning, supported by REDI, their perception of what they can do and become began to change for most of the women in the sample. With an open environment that was responsive and provided feedback, both positive and negative during continuous participation, their cognitive functionings of learning, thinking and perception continued to change. The achievement of group objectives enhanced the process of transformation. During this process, self-respect and self-esteem were enhanced. Additionally, the sample of rural women acquired new skills and their valuable life goals of being financially independent and caring for their children were promoted.

Relatedness support: Data analysis revealed that their participation was generally motivated by relatedness and not coercion. For many of the women, the subprojects were the only opportunity available to them. Additionally, their participation facilitated beneficial outcomes. Many could earn an income, feed and educate their children and contribute to community development – some of their shared valuable goals. Additionally, it was uncovered that through their participation there was a greater level of relatedness with community members and public servants.

Overall, REDI was found to have provided marginal tangible benefits in relation to the intended impact of the intervention, with the infrastructure development being the most beneficial. Surprisingly, only a minority of participants identified improvement in their income and employment opportunity, which were two of the main desired outcomes. However, most of them were optimistic about enjoying these benefits in the future. The most striking findings to emerge regarding the impact of REDI were the participants' collective responses to problems; hope in the presence of adversity and the general positive meanings attributed to their participation in REDI. Participation in the project meant aspiration, resilience, optimism, accountability and connection for majority of the sample of rural women. These findings of intangible benefits were uncovered as unintended consequences of REDI.

Inclusion of the unintended effects provided a broader informational base for the evaluation of the REDI investment and the ways in which it had influenced the quality of life of the sample of rural women.

8.7.4 Development perspectives for rural women

What they value and why. With respect to the final research question, several valuable objects were found across the diverse perspectives on development. Access to healthcare, education, income and resilience were found to be common across the perspectives. One of the main differences to emerge was in the form of achievements and aspirations.

Thematic and consultative analysis revealed 13 central capabilities for the sample of rural women. Findings on the capabilities in this study indicated that those most highly valued were: having a relationship with one's children as the social capability, being independent as a psychological capability and having good bodily health as a physical indicator, being able to invest in one's children as the economic capability. The findings show that investing in their children was a valuable life goal for most of the rural women in this study because they reasoned that their children will reciprocate caregiving to them in the future when they become adults. An interesting finding was that even though more than half the participants were investing time and money in their children, approximately 70% were doing so without any monetary or material

returns. However, it was found that their functionings as mothers provided them with valuable social and psychological rewards such as intrinsic motivation, a sense of fulfilment and accomplishment and meaningful relationships. Yet still for most of them it was their obligation to fulfil this life goal, which partly contributed to most of the psychological and material deprivations they experienced.

Disabling processes – project management team perspective. Findings regarding the cultural aspect of the development component of this study uncovered some speculations. It was assumed that an evaluation of REDI by the World Bank, sooner than five years after implementation, would be premature and could obscure the broader impact of this investment on rural development in general and specifically on the sample of rural women and their communities. In this study, REDI was found to have positively impacted the material, social, psychological and physical dimensions of the well-being of the sample of rural women. These findings provided evidence to substantiate speculations about the possibility of REDI having a broader impact on the lives on rural women. However, these findings were not dependent on a time-lapse as was speculated, but rather the application of the capability approach, which claims to be a broader evaluative framework than other monetary measurements (Sen 1999, Nussbaum 2003, Robeyns 2003, Alkire 2007). The empirical evidence found that the impact of REDI on the sample of rural women validates the breadth of the evaluative potential of the capability approach.

Another significant finding was in relation to the cultural practice of simultaneously performing productive and reproductive roles. Findings regarding this relationship suggested that rural women with children were not able to effective perform both functionings at the same time. Their inability was strongly influenced by lack of progressive economic opportunities, low skills set and limited social support. These findings match those observed in earlier studies. For example, Mason (1985) found similar tensions between the productive and reproductive roles of a sample of 55 women from both rural and urban areas. She argued that the non-monetary rewards of motherhood were so persuasive that they contributed to some women being imprisoned by menial jobs, often with the sole aim of supporting their reproductive functionings. Mason (1985) further argued that this triangle of functionings resulted in a disabling process, which was underpinned by micro, meso and macro factors. The

triangle was made up of low skilled women, who were also mothers, doing menial jobs. She stated that at the macro level is Jamaica, a former slave colony that inherited an underdeveloped economy; at the meso level both the formal and informal sectors are affected by unproductive labour practices; and at the micro level women with limited opportunities for self-actualisation are forced to find meaning in life through their role as mothers. The threat of premature evaluation procedures and the process of juggling both reproductive and productive obligations were found to have had a negative impact on the current development trajectory of the sample of rural women in Jamaica. These findings suggest that the provision of economic opportunities, such as the REDI, might be meaningful but inadequate to transform the prevailing socio-economic processes that directly influencing the quality of life of the sample of rural women.

Adequate processes – project management team perspective. A process was judged to be adequate if it promoted autonomous actions and decisions for the sample of rural women. Factors that were found to be relatively adequate were the provision of training and technical support, accumulation of community contribution, collaboration during implementation and problem-solving and formalisation of the enterprises and community groups. It was found that these processes promoted 'citizen control' (Arnstein 1969, 223). These findings are like those referred to as strengths in Rhiney's (2013) mid-term evaluation. However, the strengths noted in Rhiney's (2013) study were general and were associated with the participants, environment, tourism and agriculture sectors, infrastructure and REDI. The adequate processes identified in this study are specific to the participants, and are aimed at pointing out processes that can enhance their capability and participation in REDI and community development.

Inadequate opportunities – project management team perspective. Earlier studies have found that factors such as high outward foreign exchange leakages, weak market linkages between agriculture and tourism, lack of access to key domestic and export markets, and underdevelopment of the agriculture sector played a role in determining the current poor performance of the national economy (Rhiney 2013). These factors were identified by means of sector analysis of development at the national level. This study, however, managed to identify some of the national factors and distinguished many factors that appeared to affect development at the community and individual

levels through the experiences of rural women and from interviews with members of the REDI project management team.

These factors included inadequate amenities at the regional and community levels, specifically, limited access to water, electricity, communication services and underdeveloped marketing opportunities. Disconnection between urban and rural regions in the areas of investment, production and marketing, insufficient job opportunities and educational institutions in rural communities, inadequate and short-term plans for the sustainability of community enterprises were found to be critical factors that arrested personal and business development in rural communities. Access to established markets was found to be one of the few factors that could link development at the national, regional and community levels. Yet Rhiney (2013, 25) found that market access for small and micro enterprises (SME) was underdeveloped. However, Rhiney (2013) was optimistic about its potential to boost rural development. This optimism at the mid-term evaluation of REDI was supported by the strong emphasis of the project on improving market access for small and micro enterprises in rural communities. However, at the close of REDI expanded market access appeared minimal and confined to an increase in the number of higglers in the same market segments of selling farm produce to local markets (Charlier 2017).

Adequate opportunities – project management team perspective. This study found that only a few adequate opportunities that influenced the development process were available at the macro level. Adequacy was assessed by the availability of an opportunity, in that, the sample of rural women could access that opportunity without being hindered by their personal and social circumstances. At the national level, it was found that they could freely access the REDI grant without any overt discrimination. At the community level, they had opportunities to participate in sourcing the community contribution and the formal establishment of their community group. At the institutional level, this study found that the sample of rural women were engaged in public-private partnership as they collaborated with government agencies and private organization during and after the implementation of REDI.

Processes and opportunities – participatory consumers' perspective. These findings on the processes and opportunities emerged from the quantitative analysis of

the actual experiences of the sample of rural women. Surprisingly, it was found that the perspectives of development opportunities and processes of the management team were different from those of the sample of rural women. In looking at the opportunities women had to pursue their development, the study found that the sample of rural women identified their real opportunities mainly as self, God and their male partners, with greatest reliance on self. The study found that the processes that allowed the sample of rural women to act and make decisions regarding their capabilities were related to their available opportunities. The three main processes identified were building relationships, praying and trusting God and taking care of self. In reviewing the literature, no study with findings on the comparison between the perspectives of a project management team and project participants in relation to development opportunities and processes was identified. These findings will doubtless be much scrutinised, but there are some immediately dependable explanations that should help to guide future research on diverse perspectives of development processes and opportunities.

There are three possible explanations for the differences found. First, the perspectives of the management team related mainly to factors at the macro level, while those of the project participants were found to be at the micro level. However, a national focus on enhancing social opportunities such as peer group learning, social cohesion and managing interpersonal relationship at the community level would have been a modest overarching opportunity, given that the implementation approach of REDI was based on community development. Peer group learning, social cohesion and enhanced interpersonal relationships were three of the main guiding principles of the predecessor of Jamaica Social Investment Fund (JSIF), the Jamaica Welfare Society (JWS). Hence, the inclusion of those overarching principles would strengthen the model of community development as envisioned by the pioneers.

Second, another explanation for the differences is that while the two groups desire rural development and the advancement of rural women, they value different strategies to achieve these desired ends. The presence of persistent poverty for over 30 years in rural Jamaica means downward adaptation could partially account for the differences, wherein rural areas women adjust their desires to the available processes and opportunities – self, partner and God. According to Sen (1999), it is at these tangential

points that public deliberation becomes critical in arriving at an agreed strategy for the development of rural women.

Third, earlier in Chapter 3, Lewis (1955, 433) discussed how those living in chronic poverty developed a 'taste' or a way of living that seems counterproductive to economic growth. For the sample of rural women that everyday living consisted of building relationships, praying and trusting God and self-preservation. Since these functionings were not independently examined for connections with economic outcomes, this finding cannot be stated as being counterproductive to economic advancement. Rather, these valuable capabilities should be further evaluated considering the capability approach. What is clear, however, is that people in chronic poverty tend to develop rational ways of surviving their multiple deprivations. For the sample of rural women in this study, the findings revealed that most of the women in the sample build relationships, pray and trust God and promote self-preservation as a way of surviving multidimensional poverty in rural Jamaica.

It is in the context of divergence such as this, that Sen (1999) recommends public deliberation to arrive at a consensus. Deliberation points to consultation and negotiation among actors with varied interpretations of a problem and its solution, with the view that the sum of the total will be of greater benefit to the public than a single perception (Althaus 2007). Even though deliberation is marred by uncertainties in the policy cycle (Althaus 2007), the capability paradigm identifies it as an important end and a means to fulfilling human needs (Sen 1999, 2009). Deliberation is central to the capability paradigm for three reasons. First, it has direct connection to primary capabilities; second, it has instrumental power in advocating for fulfilment of human needs; and third, it has a constructive function in the conceptualisation of human needs (Sen 1999).

8.8 Policy implications

The research findings have several implications for public policy regarding poverty alleviation, women's development and rural development. While the sample size of this study is small, the implications discussed have taken into consideration studies with similar findings to provide some consensus on the matters being presented.

Poverty alleviation. Several previous studies found that poverty, especially the poverty experienced by women in Jamaica, is multidimensional. These studies confirm that the low quality of life of rural women is influenced by other factors than lack of food and money. In other words, they need more than food and money to enjoy the life they value and have reasons to value. The study shows that in a context of persistent poverty, like that of rural Jamaica, the sample of rural women tend to lower their expectations and sacrifice their well-being for the survival of their children. This process of downward adaptation has the potential to thwart development initiative, unless matched by meaningful participation and decent wages that is more stable than their own efforts of 'hand-to-mouth' coping strategies. Evidence of this complex relationship between poverty, productive and reproductive functionings of women have been around from early 1980s. However, the Survey of Living Conditions (SLC) of the PIOJ and STATIN continues to measure income and consumption as the proxy for human deprivation. Findings of poverty from the SLC are inadequate to support the goals of the Vision 2030 Jamaica. The time has come to revise the SLC.

Findings of this study confirm that active participation along with ownership of subprojects, greatly enhance the sustainability of poverty alleviation projects. Strategies to enhance active participation and project ownership can also enhance economic, psychological and social capabilities, thereby enhancing multiple capabilities through one initiative. This approach to poverty alleviation would possibly be effective among the sample of rural women, since they value several capabilities. However, the income from such initiative would need to be adequate to ensure that they are able to invest in their children, which is their priority.

Development for rural women. Generally, the outcomes of this study point to the need to revisit the overall approach to the development of rural women. First, the findings reveal that the development of the sample of rural women was partly an unintended consequence of government actions. The observed aspects of their development were mainly intangible, such as expansion of their social and psychological capabilities. These dimensions of development, though valuable to rural women, as revealed in this and several previous studies, were actually outside the scope of REDI. What is interesting is that some of those social and psychological

capabilities are prominently featured in the Vision 2030 Jamaica and the NPGE. This implementation gap was identified as a weakness in development planning and execution within Caribbean countries. The GOJ needs to demonstrate full commitment to a comprehensive needs assessment for rural women and complement that commitment with evidence-based project implementation. Findings on this implementation gap indicate some level of disconnection between the intentions and actions of the GOJ, which can breed distrust and disillusion among rural citizens.

Methodologically, the above findings on the implementation gap might not have been recognised with the use of regular quantitative evaluation tools and techniques. Future research aimed at assessing the development of rural women might benefit greatly from the use of a mixed-methods approach in both data collection and analysis.

Public participation. Divergence of the nature discussed in section 8.7.4 above is partly a reflection of the policy cycle and the level of citizens' participation in public debates and other democratic processes. Even though REDI employed a participatory approach at the macro and meso levels, gaps at the micro level suggest the need for a more systematic approach to citizens' participation in development initiatives that impact their lives and communities. Enhancing participation is critical for two reasons. First, the level of participation by the women in this study and those discussed in the literature review appears to have a direct influence on the development outcomes and the level of ownership by project participants. In other words, greater participation has the potential of yielding greater returns on investments in community development.

Rural development. The research findings emphasise the significant role of infrastructure, facilities and institutions in the development of rural communities. This was evident in the qualitative findings of self-reported experiences of poverty. Intergenerational poverty had a direct connection with lack of educational facilities, lack of economic infrastructure, farmers having limited access to water, land and farming amenities. The presence of newly formed and registered community groups has the potential of rural communities contributing to national social stability. This was identified as an additional social capability of the sample of participants, which they value and can therefore be harnessed for greater social, psychological and economic benefits both for the individuals and the communities.

The study also confirms that the agriculture sector remains the main source of economic activity for the sample of rural women. Research and development, along with technology and innovation could greatly expand the potential of the sector, which symbolises not only economic opportunity, but a continuation of culturally significant activities, such as cultivation of natural medicine; flexible work schedule; and remaining a source of independence for the women in this study. Additionally, farming was also a form of social interaction. However, findings from the quantitative analysis reveal a high percentage of older women in farming and less than 10% of younger women. This could be a threat of the decline in agricultural production or an opportunity to create a niche for younger people with the added benefits of technological innovation.

8.9 Conclusion

The primary objective of this research was to explore whether poverty alleviation strategies of the GOJ have been effective in positively transforming the lives of poor rural women. The subsidiary aims were to provide a broader understanding of poverty from the experiences of rural women; examine the relationships between material, social, psychological and physical dimensions of poverty; evaluate the impact of REDI on rural women; and review the processes and opportunities available to the sample of rural women for their development. The impetus for this investigation was evidence of persistent poverty among rural women in Jamaica.

Guided by the capability approach, a sequential mixed-methods study was designed to collect and triangulate data from multiple sources. Over a six-month period of employing in-depth interview, focus group, participant observation and a questionnaire survey, adequate data was collected for analysis from a sample of rural women and men, project staff members at JSIF and the World Bank.

Although qualitative and quantitative analyses of the data indicated that REDI had a positive impact on the quality of life of the sample of rural women, these findings cannot be generalised beyond these specific women and contexts involved in the current study.

Analysis of the data found that the poverty experienced by the sample of rural women was a multidimensional phenomenon. Indicators of material, social, psychological and physical dimensions of poverty were identified.

Preliminary findings of this study identified some relationships across and within the dimensions of poverty. Key relationships found were that social indicators led to material and physical indicators of poverty; social indicators of poverty aggravated psychological indicators; and material indicators contributed to psychological and physical indicators of poverty. A significant finding of the study was that an inverse relationship between their productive and reproductive functionings was observed. This finding confirms a fundamental claim of the capability approach, that is, agency goals tends to have a negative effect on well-being, especially in the context of social obligations.

Overall, REDI had impacted the lives of rural women in the communities of Bath, Maggotty, Prospect and Treasure Beach. Economic infrastructural development was evident in all four parishes. The intention for the improvement in economic infrastructure was to contribute to employment growth. However, at the time of data collection it was found that increases in employment were uneven across the communities but overall it was found to be minimal.

Greater access to an established marketing network was expected to increase the income of the project participants with the multiplier effect of reducing rural poverty. Yet only market expansion was found and this improvement was underpinned by institutional support and ownership of the subprojects at the community level. Given the time of this evaluation, it was too early to identify any meaningful impact of the project on the level of rural poverty. Suggestions of a six to 15-year impact period, especially relating to an increase in income, came from other evaluations and the research participants.

It was found that one of the greatest effects of the REDI was that cognitive development in the form of learning by practice was enhanced across all community groups. This improvement in the knowledge and practice of the participants had positively impacted all subprojects and personal aspects of the lives most of the

participants. Active participation was found to have several multiplier effects on the sample of project.

Another significant finding of this study was the high level of ownership of subprojects by the project participants across all communities. Even in the contexts of multiple difficulties this level of ownership was still found to be high but ownership was strongly influenced by the quality of participation. It was found that while most participants who could actively participate in decision-making and the operation of the subprojects exhibited high levels of ownership, those who were marginal to the process of management chose to allocate their time to doing other activities external to the subprojects. The overall effect of the REDI project was that many participants experienced some aspects of development. Therefore, based on earlier analysis of the thesis title, the REDI project was one strategy through which the Government of Jamaica improved the well-being of rural women and responded to the call to help them sing 'songs of freedom', which was based on the development that was valuable to the women.

In identifying the processes and opportunities for human development, consensus was found regarding what development should be achieved, namely, access to healthcare, education, income and resilience. However, high levels of divergence were present in how to achieve those means of development. Effectively, there was little or no convergence on the processes and opportunities of development between the perspectives of the project management team and the project participants.

8.10 Significance of findings

In Jamaica and the Caribbean there is a dearth of literature on the application of the capability approach for impact evaluation. Currently, there is no other study that has employed the capability framework to evaluate poverty alleviation programs and the development of rural women in Jamaica. This study has contributed to that void, broken new ground in human development in the Jamaican context and has offered a tool that can provide new knowledge about rural women.

First, this study confirmed that poverty alleviation projects of the Government of Jamaica can positively transform the lives of rural women, but not in all the dimensions that are valuable to rural women.

The study provided new information on the multiple dimensions of poverty, as experienced by rural women. Furthermore, the relationships across and within dimensions revealed that the poverty they experienced was intense and far-reaching. This means that for development programs and projects, like REDI, to be effective those interventions need to address more than one dimension of the poverty experienced by the sample of rural women.

The multiple functionings and capabilities observed in the lives of the sample of rural women revealed that their poverty was not only impacted by insufficient income and inadequate food. Their ranking of their various valuable capabilities also influenced their level of poverty.

8.11 Limitations

The most obvious limitation in this study was that of a small sample size, a limitation that prevented a clear generalised statement about the dimensions of poverty in rural Jamaica or pronouncing the impact of REDI on its general population of project participants. Therefore, no generalisation can be made about the level of poverty in rural Jamaica or the developmental effects of the REDI, beyond the current sample of research participants.

With a larger sample, including a greater number of women who were not mothers, or who were younger and in other rural communities, the findings would possibly be more diverse. Still the small size of the population, which consisted of a purposive sample of participants, did confirm that poverty alleviation projects of the Government of Jamaica can positively transform the lives of poor rural women.

The study was further limited by the duration and timing, which was relatively short and took place midway during the implementation phase of the project. A similar study at the beginning and at the end would be able to provide more compelling statements about the project participants and the REDI.

Finally, the research findings of this study were limited by the inherent limitations of the research tools and techniques and the challenges associated with mixed-methods design. While it was beneficial to employ both quantitative and qualitative instruments, the need for detailed coding of the qualitative data was extensively time consuming, lasting a period of approximately two years after data collection. Due to the amount of time that was allocated to the analysis of the qualitative data, findings from the analysis of the quantitative data were limited due to time constraints. Additionally, the use of a tool that can analyse more than two-way relationships would be beneficial in revealing more information about the complexities of rural poverty and the everyday life of rural women.

8.12 Further research

Future studies that refine the *Capability Survey of Rural Women in Jamaica 2014* and extend it to a national survey might be able to make a great contribution, such as directly fulfilling the goal of the National Policy for Gender Equality to gather information on the status of rural women at the national level. This activity would also directly be linked to the strategy of the Vision 2030 Jamaica – National Development Plan to employ research and development to better inform policy and program formulation for sustainable rural development. It is anticipated that more scientific evidence-based policies and programs will better ensure that more Jamaicans can have an equitably share in the benefits of national development. This research and related future studies will thereby support more Jamaicans to adequately enjoy the benefits of the freedoms they value. The inclusion of the small sample of men suggests that they also experienced multidimensional poverty. A similar study for rural men would contribute to the target of the NPGE to promote equitable access to state resources and opportunities.

In conclusion, the use of the mixed methods with the sample of rural women and men uncovered new knowledge about rural women. Here are four key findings of this exploratory study. First, analysis of the data confirmed that rural women in Jamaica experienced material, social, psychological and physical dimensions of poverty. Second, dynamic relationships between and among the material, social, psychological and physical dimensions of poverty significantly contribute to the capability literature

on coupling of deprivations, the intensity of poverty and the nature of poverty. Within the Caribbean, this finding provides new information on the nature of poverty. Missing from the literature in the region on women and development is empirical evidence of the relationships between multidimensional poverty.

Third, this study contributes to a more comprehensive understanding of the ranking of and relationship between the valuable capabilities of rural women. It was found that the women valued financial independence, the well-being of their children along with community development, but their relationship with their children and with the community often deplete their limited income; yet these relationships affirm their identity as mothers and give meaning to their lives. Their identity was generally narrow, and for those who were mothers, that was how they defined themselves. However, the measure of success of the REDI project was implicitly dependent on rural women surrendering aspects of their independence and their identity to earn more income. While earning more income was valuable to them, it was mainly in the form of aspirations, while the other valuable functionings were tangible. This complex dynamic of the valuable objects of women is missing from the literature on women and development in the Jamaica.

The findings confirmed that the REDI project had a positive impact on all dimensions of the quality of life of the sample of rural women, but at the time of data collection, REDI had the greatest impact on their psychological capabilities. Evaluation of the social and psychological dimensions of their development was not included in the scope of REDI. This study therefore makes an empirical contribution to the literature on impact evaluation by providing evidence of the usefulness of including unintended consequences in an impact evaluation.

Fourth, the findings confirmed that poverty alleviation strategies of the Government of Jamaica have the potential to enhance the capabilities of rural women. However, the process of development that is valued by the women is not the same as that of the government. For the small sample of rural women development opportunities and processes related to social capital, self-preservation and praying and trusting God. The female participants that had no children of their own, still valued the children within their community.

The use of the capability approach was beneficial in providing a broader understanding of the nature of poverty experienced by the sample of rural women, as well as the diverse opportunities and processes by which individuals pursue freedoms. This research asserts that the capabilities and functionings identified are fundamental to poverty alleviation for this sample of rural women because of their unique experiences of poverty and valued opportunities and processes for development. The public policy cycle generally begins with a definition of the problem, on which hinges all the other stages in the cycle. By providing a broader definition of poverty in rural Jamaica this thesis has contributed to that vital first stage in the formulation of more relevant development policies, projects and programs.

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Appendix A: Human Research Ethics Approval

Curtin University

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06-Apr-2017

Name: John Phillimore
Department/School: Department of Planning and Geography
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Dear John Phillimore

RE: Annual report acknowledgment
Approval number: BE-185-2013

Thank you for submitting an annual report to the Human Research Ethics Office for the project **Impact Assessment of Poverty Alleviation Strategies on Rural Women: Case Studies from Jamaica**.

The Human Research Ethics Office acknowledges the project is ongoing and approval will remain current until 30-Nov-2017.

Any special conditions noted in the original approval letter still apply.

Standard conditions of approval

1. Research must be conducted according to the approved proposal
2. Report in a timely manner anything that might warrant review of ethical approval of the project including:
   - proposed changes to the approved proposal or conduct of the study
   - unanticipated problems that might affect continued ethical acceptability of the project
   - major deviations from the HREC approved protocol procedures and/or regulatory guidelines
   - serious adverse events
3. Amendments to the proposal must be approved by the Human Research Ethics Office before they are implemented (except where an amendment is undertaken to eliminate an immediate risk to participants)
4. An annual progress report must be submitted to the Human Research Ethics Office on or before the anniversary of approval and a completion report submitted on completion of the project
5. Personnel working on this project must be adequately qualified by education, training and experience for their role, or supervised
6. Personnel must disclose any actual or potential conflicts of interest, including any financial or other interest or affiliation, that bears on this project
7. Changes to personnel working on this project must be reported to the Human Research Ethics Office
8. Data and primary materials must be retained and stored in accordance with the Western Australian University Sector Disposal Authority (WAUSDA) and the Curtin University Research Data and Primary Materials policy
9. Where practicable, results of the research should be made available to the research participants in a timely and clear manner
10. Unless prohibited by contractual obligations, results of the research should be disseminated in a manner that will allow public scrutiny; the Human Research Ethics Office must be informed of any constraints on publication
11. Ethics approval is dependent upon ongoing compliance of the research with the Australian Code for the Responsible Conduct of Research, the National Statement on Ethical Conduct in Human Research, applicable legal requirements, and with Curtin University policies, procedures and governance requirements
12. The Human Research Ethics Office may conduct audits on a portion of approved projects.

Should you have any queries regarding consideration of your project, please contact the Ethics Support Officer for your faculty or the Ethics Office at hrec@curtin.edu.au or on 9266 2784.

Yours sincerely

Dr Catherine Gangell
Manager, Research Integrity

Appendix B: Approval of REDI Project as Case Study

JAMAICA SOCIAL INVESTMENT FUND

ISO 14001:2004 CERTIFIED

"Investing for Community Development"

2nd Floor, 1C-1F Pawsey Road, Kingston 5, Jamaica.
Tel: (876) 968-4545, Fax: (876) 929-3784
Toll Free: 1-888-991-2356
E-mail: info@jsif.org Website: www.jsif.org

May 28, 2014

Ms. Siddier Chambers
Doctoral Candidate
Curtin University
Kent Street
Bentley
Western Australia 6102

Dear Madam:

Re: Request for Research Informants

We are in receipt of your letter sent to Mrs. Scarlette Gillings dated May 14, 2014 regarding captioned.

The JSIF will accommodate you doing your research thesis on the REDI project.

We wish you a successful research.

Yours sincerely
JAMAICA SOCIAL INVESTMENT FUND

Rhonda Lumsden-Lue
General Manager Human Resource & Administration, MIS, Communication

Appendix C: Interview Guide Sheet

Impact Assessment of Poverty Alleviation Strategies on Rural Women: Case Studies from Jamaica

Key Informants In-depth Interview Guide

SECTION 1: INTRODUCTION

Thank you for taking the time to meet with me today. My name is Siddier Chambers and I am a research student at Curtin University in Australia. I would like to talk to you about your experience participating in the Rural Economic Development Initiative (REDI) project. You were selected for this interview because you are able to help me to better understand how effective was REDI in meeting your needs as well as explain your perspective of poverty. The main reasons for this research is the fact that there is not enough information on rural poverty in Jamaica and only little effort has been made to understand it from women's viewpoint.

The interview should take less than two hours. I will be taking notes while we talk but it is not possible to write down everything. I want to capture a true picture of your viewpoint and the best way to do so is to tape-record the interview, but I will only do so if you are comfortable and give me your permission.

All responses will be kept confidential. This means that what we talk about will not be shared with anyone or in any way that will identify you as the respondent. Please note that you don't have to talk about anything you don't want to and you may end the interview at any time.

Do you have any questions about what I have just explained or otherwise?

Are you willing to participate in this interview?

Yes – Please sign the Consent form.

No – Thanks again for your time and all the best. Give reimbursement for travel expense, if applicable.

SECTION 2: THEMES AND QUESTIONS

The interview will explore the REDI project and wellbeing/quality of life of rural women. These two topics will be examined under the following main themes:

REDI project
- Implementation
- Achievements
- Limitations

Wellbeing of rural women
- Impact of REDI project
- Definition of poverty
- Definition of wellbeing/QoL
- Priorities, aspirations and problems

The themes will be discussed with three groups of informants:

Group A – female project participants

Group B – REDI project staff

Group C – World Bank staff (poverty program)

Each group has a different role and experience with the project; hence each group will be asked a different set of questions based on some intended and unintended impact and outcomes. See below for the set of questions for each group.

INFORMANT GROUP A: Female Project Participants

Checklist

Parish	
District/Community	
Interview location	
Date	
Start time	
End time	
(Pseudo/Code) Name of participant	
Signed Consent Form	

Issues & Questions

| **Issues & *open-ended* questions**

Tips

• No more than 15 *open-ended* questions
• Ask factual before opinion
• Use probing questions as needed:
➢ Could you give me an example?
➢ Can you tell me some more about that?
➢ Please explain that a little more?
➢ I'm not sure I fully understand what you just said.
➢ Is there anything else? | **Intended Impact**
1) What type of project or business are you involved in? Please list.
2) What kind of support was provided by REDI for this project or business? Please explain.
3) What were the intended results of the support from REDI?
4) What difference has REDI made to your income and employment opportunity? Please explain.
5) How did you provide the required 20% subproject contribution?
6) After REDI's support, to which new businesses or company have you been able to sell your products or services?
7) How different is your life now compared to what it was before participating in the REDI project?
8) To what extent did the support from REDI meet your needs?
9) What were some problems, if any, you encountered in participating in REDI, either before, during or after? Please explain.
10) How did you address these problems?

Unintended Impact
1) Were there any other benefits or challenges that resulted from REDI's support that you did not expect? Please explain.
2) As a rural woman, how did participating in REDI make you feel?
3) How do you define poverty?
4) Compared to five years ago, are you now better off or worst off?
5) Well-being /Quality of life
- How do you define a good quality of life?
- How do you define a bad quality of life?
- Describe the quality of life you are living now?
- What effect, if any, do you feel REDI has had on your quality of life?
6) Priorities and Problems
- What are the main achievements you desire for your life? Please explain in order of priority.
- Which have you achieved so far? How does achieving these goals make you feel?
- Did REDI help you to achieve any of these goals?
- What are some of the obstacles and challenges in your life that affected the goals you have achieved and the ones you have not yet achieved?
- How do you feel about these obstacles and challenges? |

Closing Key Components ➢ Additional comments ➢ Next steps ➢ Thank you	Is there anything more you would like to add about your quality of life and the REDI project? I will write up all that we have discussed and come back after one month to share it with you. I will need to better understand some of the things we have discussed, so I will ask you to explain them in more detail upon my return, if you are comfortable. Thank you for sharing your time and experience with me.

INFORMANT GROUP B: REDI Project Staff

Checklist

Parish	
Interview location	
Date	
Start time	
End time	
(Pseudo/Code) Name of participant	
Signed Consent Form	

Issues and Questions

| **Issues & *open-ended* questions**

Tips
• No more than 15 *open-ended* questions
• Ask factual before opinion
• Use probing questions as needed:
➢ Could you give me an example?
➢ Can you tell me some more about that?
➢ Please explain that a little more?
➢ I'm not sure I fully understand what you just said.
Is there anything else? | **Intended Outcomes**
1) What is your perception of the quality of life in rural Jamaica?
2) Based on your interaction with rural women, what factors are important to their life-style?
3) What factors promote a good quality of life for rural women? **(Ask about social and psychological factors if they are not mentioned)**
4) Are there factors that hinder rural women from having a good quality of life? Please explain. **(Ask about social and psychological factors if they are not mentioned)**
5) How would you describe poverty in rural Jamaica? **(Ask about social and psychological factors if they are not mentioned)**
6) What is the most pronounced type of poverty experienced by rural women?
7) How do they address this and other types of poverty?
8) What were the main strategies, interventions and tools used in the implementation of Type A subprojects? Please list.
9) State the top three (3) strategies, interventions and or tools that had the greatest effect on female participants? Please explain how and why.
10) Which of the abovementioned strategies, interventions and tools, the female participants responded to the least?
11) Please explain the reasons for the moderately satisfactory rating regarding the overall implementation of the project?
12) Similarly, the project was rated moderately unsatisfactory in relation to the achievement of the project development objectives by the last evaluation (July 2014) conducted by the World Bank, what were the main factors that contributed to this rating? |

	13) Please explain the reasons behind the proposed minor restructuring and the revised results framework which were based on the last evaluation? 14) Will the beneficiaries participate in these proposed changes? 15) What communities were visited during the fieldtrip of the proposed supervisory mission in October 2014? What were the outcomes? 16) Please explain the reasons for the absence of baseline data for Type A subprojects? 17) Please describe the general response of female participants to the required 20% community contribution. 18) What worked well? Please elaborate. 19) What would you do differently next time? Please explain why. 20) What strategies, interventions, tools, etc., would you recommend be sustained and/or scaled up? Please provide a justification for your response. 21) What strategies, interventions, tools should be discontinued? Why? 22) What were some barriers/challenges, if any, that you encountered, during and after implementation, in the following communities? Please explain. 1. Bath in St. Thomas 2. Mango Valley in St. Mary 3. Treasure Beach in St. Elizabeth 4. Maggotty in St. Elizabeth 5. Prospect in Manchester **(Ask about social and psychological factors if they are not mentioned)** 23) How did the project address the barrier(s)? 24) What were some of the achievements in these communities? 25) In general, from your perspective, what effects the project had on women's income earning ability and job opportunity? Did they increase, decrease or remain the same? 26) What recommendations would the project team offer for future poverty reduction projects for rural communities? **Unintended Outcomes** 1) Please provide justification for the breakdown of participants (men – 55%; women – 30%; youth – 15%). 2) What was the justification for the contribution of 20% subproject costs from participants? 3) What role do most female participants occupy in the groups? 4) From your perspective, how satisfied are the female participants with their project/activity in general? 5) To what extent, if any, has REDI contributed to an improvement in the quality of life of the female participants? How?

	6) In cases where female participants generated additional income, what did they use it for? 7) From your understanding, how does participating in REDI make the women feel? Why? 8) From the perspective of the project team, so far, what have been the greatest achievements of REDI? Something that make you feel like you would do it again and again in future projects? 9) How did the female participants feel about these achievements? 10) From your perspective, so far, what were the weakest aspects of the project? 11) How did the female participants feel about them? 12) For each of you, throughout the project so far, what has given you the greatest level of satisfaction? 13) Tell me about the greatest disappointment you have had from this project?
Closing Key Components ➢ Additional comments ➢ Next steps ➢ Thank you	Is there anything more you would like to add about the quality of life of the female participants and the REDI project? I will write up all that we have discussed and come back after one month to share it with you. I will need to better understand some of the things we have discussed, so I will ask you to explain them in more detail upon my return, if you are comfortable. Thank you for sharing your time and experience with me.

INFORMANT GROUP C: World Bank Program Staff

Checklist

Parish	
Interview location	
Date	
Start time	
End time	
(Pseudo/Code) Name of participant	
Signed Consent Form	

Issues & Questions

| **Issues & *open-ended* questions**

Tips

• No more than 15 *open-ended* questions
• Ask factual before opinion
• Use probing questions as needed:
➢ Could you give me an example?
➢ Can you tell me some more about that?
➢ Please explain that a little more?
➢ I'm not sure I fully understand what you just said.
Is there anything else? | **Intended Outcomes**
1) What is your perception of wellbeing in rural Jamaica?
2) What are the main factors hindering and those that are stimulating wellbeing for rural men and women? Please list.
3) What component of the REDI project has been the most successful? Please explain.
4) Based on your knowledge, to what extent has Component 1 achieved the desired objectives?
5) How has Component 1 contributed to the overall goal of the project?
6) Given the fact that rural poverty has been an enduring feature of development in Jamaica, apart from increasing income and employment opportunities in rural Jamaica, what other factors must be addressed to effectively improve the quality of life of Jamaicans in rural areas?
7) What factors or conditions represent a satisfactory quality of life for rural women in Jamaica?
8) Do the current definition and indicators of poverty sufficiently capture the situation experienced by rural women? Please explain.
9) From your perspective, how do rural women experience poverty?
10) How effective have government strategies been in eradicating rural poverty in general? Please explain the enabling factors and the factors which hinder eradication.
11) Based on your experience in other countries, how can poverty alleviation policy and programs in Jamaica deliver people-centred development? |

	12) From your perspective, what aspect of women's quality of life did REDI had the greatest impact? Why? 13) From your perspective, what aspect of women's quality of life did REDI had the least impact? Why? **Unintended Outcomes** 14) What difference has REDI made in the quality of life for rural Jamaicans? 15) What is your perspective of the aspirations and problems of rural women in Jamaica? 14) Please provide justification for the breakdown of participants (men – 55%; women – 30%; youth – 15%). 15) What was the justification for the contribution of 20% subproject costs from participants? 16) From your understanding, how does participating in REDI make the women feel? Why? 17) What evidence/factors were used to make a decision on the components of the project? 18) Were rural women involved in the formulation of this project?
Closing Key Components ➢ Additional comments ➢ Next steps ➢ Thank you	Is there anything more you would like to add about the quality of life of the female participants and the REDI project? I will write up all that we have discussed and come back after one month to share it with you. I will need to better understand some of the things we have discussed, so I will ask you to expound some of the issues upon my return, if you are comfortable. Thank you for sharing your time and experience with me.

Appendix D: Capability Survey of Rural Women in Jamaica (2014)

CAPABILITY SURVEY OF RURAL WOMEN IN JAMAICA (2014)

Research Topic: "Impact Assessment of Poverty Alleviation Strategies on Rural Women: Case Studies from Jamaica"

Legend for labels

DSCRIPT: Description of research participants
ACHIEVE: Achievement of valuable objects
OPP: Opportunity for capability
ASPIRE: Aspiration
AUTO: Autonomy
RANKVO: Ranking of valuable objects
REDIIMPACT: Impact of the REDI project
END: Rational for ranking
PROCESS: Process of obtaining valuable object
EMOJI: Emotional experience

	Parish	Community	ID No.	Date of Interview (mm/ dd /yyyy)
DSCRIPT				

Name of participant (Pseudo)	DSCRIPT
Address (District/Parish)	DSCRIPT
Telephone number	
Interview location	DSCRIPT
Start time (hrs/mins)	
End time (hrs/mins)	
Total time of interview (hrs/mins)	DSCRIPT
Interviewer	
Signed Consent Form (yes/no)	

Part A: DEMOGRAPHICS_DSCRIPT					
A) **AGE RANGE** 15 – 19…1 20 – 24…2 25 – 29…3 30 – 34…4 35 – 39…5 40 – 44…6 45 – 49…7 50 – 54…8 55 – 59…9 60 – 64…10 65 – 69…11 70 – 74…12 75 – 79…13 80 and over…14	**B)** **MARITAL STATUS** Single…1 Common-law relationship…2 Married…3 Divorced…4 Widowed…5 Separated…6 Other…7 Not stated…99	**C)** **HOUSEHOLD STATUS** a) Person with at least one family nucleus: Husband…1 Partner…2 Lone mother…3 Child(ren) living with both parents…4 Child(ren) living with lone mother…5 Child(ren) living with lone father…6 Child(ren) living with both parents and other relatives…7 Child(ren) living with one parent and other relatives…8 b) Person in a household with no family nucleus: Living alone…1 Living with others…2 Not stated…99	**D)** **FAMILY SIZE** 1…Number of child(ren): 2…Number of adults:	**E)** **RELATIONSHIP TO HEAD OF HOUSEHOLD** Head…1 Wife of head…2 Common law partner…3 Child(ren)…4 Grand-child(ren)…5 Parent…6 Brother…7 Sister…8 Other…9 Not stated…99	**F)** **COMPOSITION OF HOUSEHOLD WITH FEMALE HEAD** No man, no child…1 No man with child(ren)…2 With man, no child…3 With man, with child(ren)…4 With man, child(ren) and relatives/others…5 Living with others…6 Sibling (s)…7 Other relatives…8 Other…9 Not stated…99

Part A: DEMOGRAPHICS_DSCRIPT				
G) **PRODUCTIVE STATUS** Unemployed (unable to work)…1 Unemployed (seeking work)…2 Self-employment…3 Retired…4 Seasonal/part-time employment…5 Waged employment…6 Other…7 Not stated…99	**H)** **REPRODUCTIVE STATUS** Neighbour …1 Friend …2 Great-Grandmother…3 Aunt…4 Sister…5 Grandmother…6 Mother …7 Other…8 Not stated…99	**I)** **SPIRITUAL AFFILIATION** Jews …1 Hindus …2 Muslim…3 Buddhist…4 Rastafarian …5 Christian …6 Other…7 Not stated…99	**J)** **SOURCE OF ACQUIRING KNOWLEDGE:** ***Informal …1*** **(other ways of acquiring knowledge)** Life experience …1 Self-taught…2 Peers…3 Parents…4 Other…5 ***Formal …2*** **(highest level of schooling rec'd)** Skills training institution…1 Basic school…2 Primary school…3 Secondary school…4 College…5 University…6 Other…7 Not stated…99	**K)** **RACE** European…1 Afro-European…2 East Indian…3 Afro-East Indian…4 Chinese…5 Afro-Chinese…6 African descent…7 Other…8 Not stated…99

Part B: ECONOMIC CAPABILITY

1) Being able to work

A)
Describe the work you do to earn money? _ACHIEVE

B)
How much money did you earn for each (…) in the past 30 days AND time (hrs) spent for each? _ACHIEVE

Occupation/SOURCES OF INCOME	**J$**	**Time (HRS/Days)**
Social support (govt. benefit, pension, REMITTANCES)…1		
Social development (community unity, care-giving, etc.)…2		
Tourism (hospitality, personal service, etc.)…3		
Knowledge development (teaching, preaching, etc.)…4		
Leisure (events coordinator, tour organiser, etc.)…5		
Agriculture (farming, poultry rearing, etc.)…6		
Manufacturing (craft, sewing, etc.)…7		
Other…8		
Not applicable…9		

Not stated…99

(MULTIPLE RESPONSES)

C)
What other work can you do? _OPP

Govt. benefit, pension, etc….1
Community unity, care-giving, etc….2
Hospitality, personal service, etc….3
Teaching, preaching, etc….4
Events coordinator, tour organiser, etc….5
Farming, poultry rearing, etc….6
Craft, sewing, etc….7
Other…8
Not applicable…9

Not stated…99

(MULTIPLE RESPONSES)

D)
Who assists you with your work? _OPP

Bank …1
Neighbour…2
Government agency …3
Relative…4
Partner…5
Friend …6
Child(ren)…7
Other…8
Not applicable…9

Not stated…99

E)
Who else would you want to help with your work? _ASPIRE

Bank …1
Neighbour…2
Government agency …3
Relative…4
Partner…5
Friend …6
Child(ren)…7
Other…8
Not applicable…9

Not stated…99

Part B: ECONOMIC CAPABILITY		
1) Being able to work (cont.)		
F) **Who decides how the money from the job(s) is spent? _AUTO** Bank…1 Relative…2 Government agency…3 Self…4 Partner…5 Self and partner…6 Friend…7 Other…8 Not applicable…9 Not stated…99	**G)** **What were the main things for which the money was used? _ACHIEVE** Spiritual investment (tithes, etc.)…1 Emotional (leisure activities, etc.)…2 Social investment (school fee, govt. taxes, etc.)…3 Economic investment (savings, expand asset, etc.)…4 Psychological investment (buy what I want, etc.)…5 Consumption goods (food, clothes, bills, etc.)…6 Other…7 Not applicable…8 Not stated…99 **(MULTIPLE RESPONSES)**	**H)** **What else you could have used this money for? _ASPIRE** Spiritual investment (tithes, etc.)…1 Emotional (leisure activities, etc.)…2 Social investment (school fee, govt. taxes, etc.)…3 Economic investment (savings, expand asset, etc.)…4 Psychological investment (buy what I want, etc.)…5 Consumption goods (food, clothes, bills, etc.)…6 Other…7 Not applicable…8 Not stated…99

Part B: ECONOMIC CAPABILITY (CONT.)

2) Having ownership of productive assets

A)
What are some of the things you have which you own? _ACHIEVE

B)
How many of each do you own? _ACHIEVE

Asset	Number	
Land 1		
House 2		
Vehicle.....3		
Shop/Business.....4		
Animal.....5		
Furniture.....6	(list below)	
Other 7		
Not applicable.....8		

Not stated.....99

C)
What are some of the things you have but do not own? _OPP

D)
How many of each do you have access to? _OPP

Asset	Number	
Land 1		
House 2		
Vehicle.....3		
Shop/Business.....4		
Animal.....5		
Furniture.....6	(list below)	
Other 7		
Not applicable.....8		

Not stated.....99

E)
What else do you want to own? _ASPIRE

Land 1
House 2
Vehicle.....3
Shop/Business.....4
Animal.....5
Furniture.....6
Other 7
Not applicable.....8

Not stated.....99

Part B: ECONOMIC CAPABILITY (CONT.)

3) Being able to invest in child/children ***(FOR THOSE WITH CHILD(REN)***

F)	G)	H)	I)	J)
What are some of the things you did for the sake of your child(ren) but they made you uncomfortable? _AUTO Spiritual sacrifice (unable to give tithe, multiple partners, etc.) …1 Psychological sacrifice (depend on others, give-up desires, etc.)…2 Social sacrifice (change partner, give-up time with friends, etc.)…3 Emotional sacrifice (Beg, accept humiliation, etc.)…4 Physical sacrifice (denial of food, work extra hours, etc.)...5 Economic sacrifice (Use savings to pay school fee, etc.)…6 Other…7 Not applicable…8 Not stated…99 **(MULTIPLE RESPONSES)**	**How much time was spent on caring for your child(ren) during the past 24 hours? _ACHIEVE** None…1 1-2 hrs…2 3-4 hrs…3 5-6 hrs…4 7-8 hrs…5 9-10 hrs…6 11-12 hrs…7 More than 12 hrs…8 Not stated…99	**What other work could you have done during the time spent caring for your child(ren). _OPP** Community unity, care-giving, etc….1 Events coordinator, tour organiser, etc….2 Hospitality, personal service, etc….3 Teaching, preaching, etc….4 Farming, poultry rearing, etc….5 Agro-processing, craft, sewing, etc….6 Other…7 Not stated…99	**How much money did you spend on the following items to care for your child(ren) during the past 30 days? _ACHIEVE** **ITEM** / **AMT J$ - est.** Health/medication…1 Transportation…2 Schooling (fees & lunch money)…3 Clothes/Uniform…4 Food…5 Other…6 Not stated…99	**What else could you have spent that money (total) on? _OPP** Care for self…1 Care for partner…2 Start a business…3 Reinvest in assets…4 Improve skills/ knowledge…5 Recreational activities…6 Care for parents…7 Other…8 Not stated…99

Part C: ECONOMIC CAPABILITY - INDICATORS, RANKING AND IMPACT

RANKING		SUMMARY AND IMPACT OF MOST IMPORTANT CAPABILITY				
A) **Rank the following in order of importance, with 1 being most important and 3 being least important. _RANKVO**		**B)** **HOW did your participation in the REDI/community cooperative/benevolent society benefit you in the following areas? _REDIIMPACT** *Means*	**C)** **Name the reasons/why/ (…) is important to you? _END** *Ends*	**D)** **Who helped you to be/have (…)? _OPP** Opportunity	**E)** **What was it you had to do before you got help with (…)? _PROCESS** *Process*	**F)** **How satisfied are you with the money you have and the things you own? _EMOJI** *Feeling*
Indicators	**Ranking**					
Being able to work…1		**Work:** Increased income/ work…1 Expanded market/customers…2 Other…3 **Assets:** Access to credit…4 Increased assets…5 Other…6 **Invest in child(ren):** Provided information on parenting…7 Events/activities for the child(ren)…8 Other…9 Not stated…99 **(Beneficiaries of REDI Project ONLY)**	**(…) = most important in row A** Have a secure family life…1 Being able to care for my child(ren)/family…2 Being able to share with friends and needy…3 Having improved skills/knowledge…4 Being able to experience love and enjoyment…5 Having hope and being creative…6 Other…7 Not stated…99	Bank…1 Neighbour…2 Government agency…3 Relatives…4 Partner…5 God…6 Friends…7 Self….8 Other…9 Not applicable…10 Not stated…99	Secure collateral…1 Submit proposal…2 Build relationship…3 Participate in community group…4 Use savings/asset…5 Take care of self…6 Pray and trust God…7 Other…8 Not stated…99	Very satisfied…1 Somewhat satisfied…2 Neither satisfied nor unsatisfied…3 Somewhat unsatisfied…4 Very unsatisfied…5 Not stated…99
Having ownership of productive assets…2						
Being able to invest in child/children (FOR THOSE WITH CHILD(REN)…3						

PART D: PHYSICAL CAPABILITY					
1) Having good bodily/physical health					
A) **In the past 4 weeks have you had any injury or physical pain or health related matters that stopped you from doing your normal day-to-day activities? _ACHIEVE** No = 1 (>C) Yes = 2 B) **What type of incident/accident? _ACHIEVE** Motor vehicle…1 Domestic accident…2 Industrial/ farming accident…3 Domestic incident…4 Other violent related incident…5 Not stated…99	C) **Have you had any other illnesses than that due to injury, in the past 4 weeks? _ACHIEVE** Breast cancer…1 Cervical cancer…2 Chikungunya…3 Cold…4 Diarrhoea…5 Asthma attack…6 Hypertension (high/low blood pressure)…7 Diabetes (sugar)…8 Other…9 Not stated…99	D) **What do you normally do to have good physical health? _PROCESS** Pray to God …1 Eat good food…2 Prepare home remedies…3 Get medication/home remedies from friend…4 Go to the doctor …5 Exercise…6 Other…7 Not stated…99	E) **What else can you do to keep good physical health? _OPP** Pray to God …1 Eat good food…2 Prepare home remedies…3 Get medication/home remedies from friend…4 Go to the doctor …5 Exercise…6 Other…7 Not stated…99	F) **Being in good physical health, what normal activities were you able to carry out in the past 4 weeks? _ACHIEVE** Care for self…1 Attend church …2 Improve knowledge/skills…3 Work to care for family…4 Care for the needy …5 Attend community meetings…6 Work to earn money…7 Enjoy leisure activities…8 Other…9 Not stated…99	G) **What other physical activities can you do when you are in good physical health? _OPP** Care for self…1 Attend church …2 Improve knowledge/skills…3 Work to care for family…4 Care for the needy …5 Attend community meetings…6 Work to earn money…7 Enjoy leisure activities…8 Other…9 Not stated…99

PART D: PHYSICAL CAPABILITY (CONT.)					
2) Being able to have child(ren)					
A) **How many child(ren) did you give birth to or cared for? _ACHIEVE** Not applicable…1 (>next section) Number:____…2 Age:…3 Not stated…99 B) **How would you describe the health of your child(ren)? _ACHIEVE** Very good…1 Good…2 Fair…3 Poor…4 Very poor…5 Not stated…99	C) **What were the main things you did to maintain the health of your child(ren)? _PROCESS** Showed them love and discipline …1 Spent time doing recreational activities…2 Visit to the doctor/clinic…3 Praised and encouraged them…4 Gave them proper food…5 Taught them about God…6 Other…7 Not stated…99	D) **What was the highest level of schooling achieved by your child(ren) overall? _ACHIEVE** ***Informal …1* (other ways of acquiring knowledge)** Life experience …1 Self-taught…2 Peers…3 Parents…4 Other…5 ***Formal …2* (highest level of schooling rec'd)** Skills training institution…1 Basic school…2 Primary school…3 Secondary school…4 College…5 University…6 Other…7 Not stated…99	E) **What more can you do to improve the education of your child(ren)? _OPP** Spend time or get help with school work…1 Improve the health of the child(ren)…2 Get help from the father…3 Spend more money…4 Request government support …5 Nothing more…6 Other…7 Not stated…99	F) **What is your child(ren) doing now? _ACHIEVE** Agro-processing, craft, sewing, etc….1 Farming, poultry rearing, etc….2 Hospitality, personal service, etc….4 Basic school…5 Primary school…6 Secondary school…7 University…8 Other…9 Not stated…99	G) **What more can you do to improve what your child(ren) is doing now? _ASPIRE** Spend time and help…1 Get help from the father…2 Request government support…3 Improve the health of the child(ren)…4 Send them back to school…5 Nothing more…6 Other…7 Not stated…99

PART D: PHYSICAL CAPABILITY (CONT.)			
3) Having skills and practical knowledge			
A) **Name some of the skills you have and things you know how to do? _ACHIEVE** Craft, sewing, etc….1 Community unity, care-giving, etc….2 Hospitality, personal service, etc….3 Teaching, preaching, etc….4 Events coordinator, tour organiser, etc….5 Farming, poultry rearing, etc….6 Other…7 Not stated…99 **MULTIPLE RESPONSES**	B) **In what way have these skills benefited you/your household? _ACHIEVE** Shared with friends & needy, etc…1 Increased income/market etc…2 Improved skills, knowledge, etc….3 Being independent and motivated, etc….4 Helped to feel good about self, etc….5 To have hope and show creativity, etc….6 Other…7 Not stated…99	C) **What other thing you want to learn how to do? _ASPIRE** Craft, sewing, etc….1 Community unity, care-giving, etc….2 Hospitality, personal service, etc….3 Teaching, preaching, etc….4 Events coordinator, tour organiser, etc….5 Farming, poultry rearing, etc….6 Other…7 Not stated…99	D) **How would this additional training benefit you/your household? _ASPIRE** Shared with friends & needy, etc…1 Increased income/market, etc…2 Improved skills, knowledge, etc….3 Being independent and motivated, etc….4 Helped to feel good about self, etc….5 To have hope and show creativity, etc….6 Other…7 Not stated…99

Part E: PHYSICAL CAPABILITY - INDICATORS, RANKING AND IMPACT

RANKING		SUMMARY AND IMPACT OF MOST IMPORTANT CAPABILITY				
A) **Rank the following in order of importance, with 1 being most important and 3 being least important.** **_RANKVO**		**B)** **HOW did your participation in the REDI/community cooperative/benevolent society benefit you in the following areas?** **_REDIIMPACT** *Means*	**C)** **Name the reasons why (…) is important to you?** **_END** **(…) = most important in column A)**	**D)** **Who helped you to be/have (…)? _OPP**	**E)** **What was it you had to do before getting help with (…)? _PROCESS**	**F)** **How satisfied are you with your health and skills? _EMOJI**
Indicators	**Ranking**					
Having good bodily health		Physical health: Access to health care…1 Provided support for health care…2 Other…3 Have child(ren): To give birth…4 To care for child(ren)…5 Other…6 Skills/practical knowledge: Learn new skills…7 Improve/share skills…8 Other…9 Not stated…99 **(Beneficiaries of REDI Project ONLY)**	Have a secure family life…1 Being able to care for my child(ren)/family…2 Being able to share with friends and needy…3 Having improved skills/knowledge…4 Being able to experience love and enjoyment…5 Having hope and being creative…6 Other…7 Not stated…99	Bank…1 Neighbour…2 Government agency…3 Relatives…4 Partner…5 God…6 Friends…7 Self….8 Other…9 Not applicable…10 Not stated…99	Secure collateral…1 Submit proposal…2 Build relationship…3 Participate in community group…4 Use savings/asset…5 Take care of self…6 Pray and trust God…7 Other…8 Not stated…99	Very satisfied…1 Somewhat satisfied…2 Neither satisfied nor unsatisfied…3 Somewhat unsatisfied…4 Very unsatisfied…5 Not stated…99
Being able to have child(ren)						
Having skills and practical knowledge						

PART F: SOCIAL CAPABILITY

1) Being able to participate in community activities

A)	B)	C)	D)	E)	F)
Which of the following community activities you participated in during the past 30 days? _ACHIEVE	**What other community activity you would want to participate in? _ASPIRE**	**Did you share the following with anyone in your community during the past 30 days? _ACHIEVE**	**Did anyone in your community share the following with you during the past 30 days? _ACHIEVE**	**What else you would want someone to share with you? _ASPIRE**	**How much time did you spend with the following persons in the past 7 days? _ACHIEVE**
Family activities…1 Church events…2 Recreational events…3 Community/ group meetings…4 PTA (Parent-Teachers Association)…5 Government public awareness activities…6 Knowledge/skills training…7 Other…8 Not stated…99 **MULTIPLE RESPONSE**	Family activities…1 Church events…2 Recreational events…3 Community/ group meetings…4 PTA (Parent-Teachers Association)…5 Government public awareness activities…6 Knowledge/skills training…7 Other…8 Not stated…99	Emotional support…1 Food…2 Time…3 Labour…4 Knowledge…5 Money…6 Other…7 Not stated…99	Emotional support…1 Food…2 Time…3 Labour…4 Knowledge…5 Money…6 Other…7 Not stated…99	Emotional support…1 Food…2 Time…3 Labour…4 Knowledge…5 Money…6 Other…7 Not stated…99	**Person** / **TIME (0 – 24 hrs.)** Partner…1 Relatives…2 Parent(s)…3 Friends…4 The needy…5 Other…6 Not stated…99

PART F: SOCIAL CAPABILITY (CONT.)				
2) Having a relationship with child(ren)				
A) **In what ways did you and your child(ren) communicate in the past 7 days? _ACHIEVE** Message…1 Face to face…2 Telephone…3 None…4 Other…5 Not stated…99	**B)** **What other ways you would want to communicate with your child(ren)? _ASPIRE** Message…1 Face to face…2 Telephone…3 None…4 Other…5 Not stated…99	**C)** **What ways did you show affection to your child(ren) in the past 30 days? _ACHIEVE** Quality time (visit, call, etc.)…1 Give gift (food, clothes, etc.)…2 Words of affirmation (praise, guidance encouragement, etc.)…3 Acts of service (help with manual labour at home/work, etc.)…4 Discipline (warning, correction, spanking, etc.)…5 Physical expressions (hugs, smile/laugh, play, etc.)…6 Other…7 Not stated…99	**D)** **What ways did your child(ren) show affection to you over the past 30 days? _ACHIEVE** Quality time (visit, call, etc.)…1 Give gift (food, clothes, etc.)…2 Words of affirmation (praise, guidance encouragement, etc.)…3 Acts of service (help with manual labour at home/work, etc.)…4 Discipline (warning, correction, spanking, etc.)…5 Physical expressions (hugs, smile/laugh, play, etc.)…6 Other…7 Not stated…99	**E)** **What other expression(s) of affection you would want to receive from your child(ren)? _ASPIRE** Quality time (visit, call, etc.)…1 Give gift (food, clothes, etc.)…2 Words of affirmation (praise, guidance encouragement, etc.)…3 Acts of service (help with manual labour at home/work, etc.)…4 Discipline (warning, correction, spanking, etc.)…5 Physical expressions (hugs, smile/laugh, play, etc.)…6 Other…7 Not stated…99

PART F: SOCIAL CAPABILITY (CONT.)					
3) Being known					
A) **Are you well-known by the following person/group in your community? _ACHIEVE** Yes…1 No…2 (>B) **Well-known by who?** Police…1 Member of Parliament…2 Church members…3 Community group members…4 Business/Shop owner…5 Neighbour…6 Other…7 Not stated…99 **MULTIPLE RESPONSE**	**B)** **From the list below, whom else do you want to know in your community? _ASPIRE** Police…1 Member of Parliament…2 Church members…3 Community group members…4 Business/Shop owner…5 Neighbour…6 Other…7 Not stated…99	**C)** **Are you comfortable in your community? _ACHIEVE** Yes…1 No…2 (>D) **In what ways do you make yourself comfortable in your community?** Attend church …1 Stay away from those who disagree with you…2 Work at home/ close to home…3 Participate in community activities…4 Help neighbours/needy…5 Avoid borrowing/begging…6 Other…7 Not stated…99 **MULTIPLE RESPONSE**	**D)** **What other way you could be more comfortable in your community? _ASPIRE** Attend church …1 Stay away from those who disagree with you…2 Work at home/ close to home…3 Participate in community activities…4 Help neighbours/needy…5 Avoid borrowing/begging…6 Other…7 Not stated…99	**E)** **Which of your needs are being met within your community? _ACHIEVE** Social (friends, sharing, etc.)…1 Economic (work, own land, access to credit, etc.)…2 Physical (skills training, etc.)…3 Psychological (independent living, etc.)…4 Emotional (love, enjoyment, etc.)…5 Spiritual (hope, expression of creativity, etc.)…6 Other…7 Not stated…99 **MULTIPLE RESPONSE**	**F)** **What other needs do you have that you would want to be met within your community? _ASPIRE** Social (friends, sharing, etc.)…1 Economic (work, own land, access to credit, etc.)…2 Physical (skills training, etc.)…3 Psychological (independent living, etc.)…4 Emotional (love, enjoyment, etc.)…5 Spiritual (hope, expression of creativity, etc.)…6 Other…7 Not stated…99

PART F: SOCIAL CAPABILITY (CONT.)					
4) Having a loving and faithful partner					
A) **How would you rate your level of satisfaction with your family life now? _EMOJI** Very satisfied…1 Somewhat satisfied…2 Neither satisfied nor unsatisfied…3 Somewhat unsatisfied…4 Very unsatisfied….5 Not stated…99	**B)** **What helps you to feel very satisfied with your family life, whether you are very satisfied or otherwise? _EMOJI** Skill/knowledge…1 House…2 Partner…3 Regular income…4 Children…5 Friends…6 Recreational activities…7 Others…8 Not stated…99	**C)** **How secure do you feel about your family life? _EMOJI** Very secure…1 Somewhat secure…2 Neither secure nor insecure…3 Somewhat insecure…4 Very insecure…5 Not stated…99	**E)** **What gives you the greatest level of security in your family life, whether you are very secure or not? _ASPIRE** Skill/knowledge…1 House…2 Partner…3 Regular income…4 Children…5 Friends…6 Recreational activities…7 Others…8 Not stated…99	**F)** **Do you have a partner? _ACHIEVE** Yes…1 No…2 (> next section) Male…3 Female…4 **What has your partner done to make you feel special over the past 30 days? _ACHIEVE** Closeness (face-to-face talk, a caring call, etc.)…1 Esteem (recognise areas of leadership, celebrate special dates and events, etc.)…2 Openness (talk about problems, share concerns, etc.)…3 Understanding (listen, speak to with respect, etc.)….4 Sexual intercourse (sexual gestures, foreplay, etc.)…5 Loyalty (be committed, care for the children, etc.)…6 Other…7 Not stated…99 **(MULTIPLE RESPONSES)**	**G)** **What else you would want your partner to do to make you feel special? _ASPIRE** Closeness (face-to-face talk, a caring call, etc.)…1 Esteem (recognise areas of leadership, celebrate special dates and events, etc.)…2 Openness (talk about problems, share concerns, etc.)…3 Understanding (listen, speak to with respect, etc.)…4 Sexual intercourse (sexual gestures, foreplay, etc.)…5 Loyalty (be committed, care for the children, etc.)…6 Other…7 Not stated…99

Part G: SOCIAL CAPABILITY - INDICATORS, RANKING AND IMPACT

RANKING		SUMMARY AND IMPACT OF MOST IMPORTANT CAPABILITY				
A) **Rank the following in order of importance, with 1 being most important and 4 being least important. _RANKVO**		**B)** **HOW did your participation in the REDI/community cooperative/benevolent society benefit you in the following areas? _REDIIMPACT** *Means*	**C)** **Name the reason why (…) is important to you? _END** **(…) = most important in section A)**	**D)** **Who helped you to be/have (…)? _OPP**	**E)** **What was it that you had to do before getting help? _PROCESS**	**F)** **How satisfied are you with your connections to people? _EMOJI**
Indicators	**Ranking**					
Having a loving and faithful partner …1		**Loving & faithful partner:** Improved relationship with partner…1 Help partner to make you feel special…2 Other….3 Relationship with children: Improved communication…4 Improved expressions of affection…5 Other…6 Being known: To meet people…7 To feel comfortable…8 Other…9 Participate in community: Participate in group activities…10 To share with others…11 Receive help from others…12 Not stated…99 **(Beneficiaries of REDI Project ONLY)**	Have a secure family life…1 Being able to care for my child(ren)/family…2 Being able to share with friends and needy…3 Having improved skills/knowledge…4 Being able to experience love and enjoyment…5 Having hope and being creative…6 Other…7 Not stated…99	Bank…1 Neighbour…2 Government agency…3 Relatives…4 Partner…5 God…6 Friends…7 Self….8 Other…9 Not applicable…10 Not stated…99	Secure collateral…1 Submit proposal…2 Build relationship…3 Participate in community group…4 Use savings/asset…5 Take care of self…6 Pray and trust God…7 Other…8 Not stated…99	Very satisfied…1 Somewhat satisfied…2 Neither satisfied nor unsatisfied…3 Somewhat unsatisfied…4 Very unsatisfied…5 Not stated…99
Having a relationship with child(ren)…2						
Being known…3						
Being able to participate in community activities…4						

PART J: PSYCHOLOGICAL CAPABILITY

1) Being independent

C)

Who makes the final decision on the following activities/responsibilities? _AUTO

DECISION-MAKERS

Self & partner…1
Self…2
Partner…3
Child(ren)…4
Other…5

Not stated…99

responsibilities	Decision-maker
Household expenses …1	
nurturing child/children…2	
child/children's education…3	
roles and responsibilities within the home…4	
Meals/nutrition…5	
Discipline child(ren)…6	
Career/work choices…7	
Savings	
Other…8	

F)

What do you do whenever you are unable to meet your personal and household needs? _ACHIEVE

Pray…1
Ask for help from relatives…2
Ask for help from partner/child's father…3
Seek assistance from government agency…4
Seek assistance from community group…5
Seek assistance from friends…6
Avoid going in public …7
Seek a job…8
Other…9

Not stated…99

G)

Which one of your needs you often work to achieve first? _ACHIEVE

Emotional (love, self-respect, etc.)…1
Spiritual (hope, creativity, feeling of contentment, etc.)…2
Physical (skills, knowledge, training, etc.)…3
Psychological (self-employment, personal safety, motivate, etc.)…4
Social (friends, sharing, etc.)…5
Economic (work, asset, access to credit, etc.)…6
Other…7

Not stated…99

H)

Which one of your needs is often unmet? _ACHIEVE

Emotional (love, self-respect, etc.)…1
Spiritual (hope, creativity, feeling of contentment, etc.)…2
Physical (skills, knowledge, training, etc.)…3
Psychological (self-employment, personal safety, motivate, etc.)…4
Social (friends, sharing, etc.)…5
Economic (work, asset, access to credit, etc.)…6
Other…7

Not stated…99

PART J: PSYCHOLOGICAL CAPABILITY (CONT.)			
2) Being cautious			
A) **What is the MAIN way you deal with disagreements? _PROCESS** Talk about the disagreement with someone else…1 Seek help to resolve it…2 Isolate from person(s) in disagreement with…3 Talk to the person(s) in disagreement with…4 Pray about it…5 Walk away…6 Other…7 Not stated…99	**B)** **What other way you would want to deal with disagreements? _ASPIRE** Talk about the disagreement with someone else…1 Seek help to resolve it…2 Isolate from person(s) in disagreement with…3 Talk to the person(s) in disagreement with…4 Pray about it…5 Walk away…6 Other…7 Not stated…99	**C)** **What is the MAIN chance you would not take now? _OPP** Talk about intimate life with a friend…1 Borrow loan from a bank…2 Talk to someone about their mistreatment of you…3 Trust your partner…4 Use your savings to send child(ren) to school…5 Other…6 Not stated…99	**E)** **If you could live your life over, what is the ONE thing you would do differently? _OPP** Care for yourself better…1 Develop a business…2 Learn how to make friends…3 Choose a different partner…4 Get more help from partner/father to care for the child(ren)…5 Choose a skill…6 Other…7 Not stated…99

PART J: PSYCHOLOGICAL CAPABILITY (CONT.)					
3) Being motivated					
A) **What would you say is the main purpose for your life? _END** Being able to experience love and enjoyment…1 Having hope and being creative…2 Help my child(ren) achieve a good education…3 Being able to share with friends and needy…4 Having improved skills/knowledge…5 Have a stable family life…6 Other…7 Not stated…99	B) **What is the main thing you are doing now to achieve that goal? _ACHIEVE** Participating in community activities…1 Developing a business/work…2 Going to parties and trips…3 Using what I have to create things…4 Improving my skill/knowledge…5 Investing in my child(ren)…6 Other…7 Not stated…99	C) **Name the activities that you feel confident doing? _ACHIEVE** Participating in community activities…1 Developing a business/work…2 Going to parties and trips…3 Using what I have to create things…4 Improving my skill/knowledge…5 Investing in my child(ren)…6 Other…7 Not stated…99	D) **What are some other activities that you would want to feel more confident in doing? _ASPIRE** Participating in community activities…1 Developing a business/work…2 Recreational activities…3 Being creative…4 Improving my skill/knowledge…5 Investing in my child(ren)…6 Other…7 Not stated…99	E) **How were you recognised for the things you did (eg. in the home/work/community activity) in the past 30 days? _ACHIEVE** Positive affirmation (praise, respect, thanks, etc.)…1 Constructive feedback (evaluation, re-training, change of plan, etc.)…2 Being included in decision-making…3 Skills development opportunity (training, promotion/assigned task/role, etc.)…4 Awards (financial, certification, etc.)…5 Recognition for outstanding effort…6 Safe work environment (appropriate tools, materials, etc.)…7 Other…8 Not stated…99 **MULTIPLE RESPONSES**	F) **Name the other way you would want to be recognised for your contribution in the activities (eg. Home/work/community)? _ASPIRE** Positive affirmation (praise, respect, thanks, etc.)…1 Constructive feedback (evaluation, re-training, change of plan, etc.)…2 Being included in decision-making…3 Skills development opportunity (training, promotion/assigned task/role, etc.)…4 Awards (financial, certification, etc.)…5 Recognition for outstanding effort…6 Safe work environment (appropriate tools, materials, etc.)…7 Other…8 Not stated…99

Part K: PSYCHOLOGICAL CAPABILITY - INDICATORS, RANKING AND IMPACT

RANKING		SUMMARY AND IMPACT OF MOST IMPORTANT CAPABILITY				
A) **Rank the following in order of importance, with 1 being most important and 3 being least important. _RANKVO**		**B)** **HOW did your participation in the REDI/community cooperative/benevolent society benefit you in the following areas? _REDIIMPACT** *Means*	**C)** **Name the reasons why (…) is important to you? _END** **(…) = Most important in column A)**	**D)** **Who helped you to be (…)? _OPP**	**E)** **What is it you had to do to be able to (…)? _PROCESS**	**F)** **How satisfied are you with your ways of thinking? _EMOJI**
Indicators	**Ranking**					
Being independent…….1		Being independent: To participate in decision-making…1 Gave us what we requested…2 Taught to earn for self/household…3 Taught ways to save/invest…4 Other…5 Being cautious: Allowed expressions of disagreements…6 Given new roles/responsibilities…7 Corrected when mistakes are made…8 Other…9 Being motivated: Be creative and hopeful…10 Showed us role-models of success…11 Provided guidance…12 Other…….13 Not stated……99 **(Beneficiaries of REDI Project ONLY)**	Have a secure family life…….1 Being able to raise child(ren)……2 Being able to have friends…..3 Having improved skills/knowledge……4 Being able to experience love and enjoyment……5 Having hope and being creative……6 Enhances self-esteem/self-worth…….7 Other……8 Not stated……99	Bank…1 Neighbour…2 Government agency…3 Relatives…4 Partner…5 God…6 Friends…7 Self….8 Other…9 Not applicable…10 Not stated……99	Secure collateral……1 Submit proposal……2 Build relationship……3 Participate in community group……4 Use savings/asset……5 Take care of self……6 Pray and trust God…….7 Other……8 Not stated……99	Very satisfied…….1 Somewhat satisfied……2 Neither satisfied nor unsatisfied……3 Somewhat unsatisfied……4 Very unsatisfied……5 Not stated……99
Being cautious……2						
Being motivated…….3						

Part N: CAPABILITY AND LIFE SATISFACTION - RANKING AND IMPACT

RANKING		SUMMARY AND IMPACT OF MOST IMPORTANT CAPABILITY				
A) **Rank the following things about your life in order of importance, with 1 being most important and 4 being least important.** **_RANKVO**		**B)** **In which of these areas you benefited the most and in which you benefited the least from the REDI/community cooperative/benevolent society? _REDIIMPACT** **MOST……1** **LEAST……2** **(Beneficiaries of REDI Project ONLY)**	**C)** **How satisfied are you with yourself? _EMOJI** Very satisfied……1 Somewhat satisfied……..2 Neither satisfied nor unsatisfied……..3 Somewhat unsatisfied……4 Very unsatisfied……5 Not stated……..99	**D)** **Taking all things together, would you say you are: _EMOJI** Very content……1 Somewhat content……2 Neither content nor discontent……3 Somewhat discontent……4 Very discontent……5 Not stated……99	**E)** **Compared to this time last year, would you say that your life has improved or worsened, overall? _ACHIEVE** Improved……1 More or less the same……2 Worsened……3 Other ……..4 Not stated……99	**F)** **And in three (3) year from now, do you expect that your life will be better or worse, overall? _ASPIRE** Better……1 More or less the same……2 Worse……3 Other ……..4 Not stated……99
Indicators	**Ranking**					
Money and possessions……1						
Health and skills……2						
Connections with people……3						
Ways of thinking……4						

THANK YOU VERY MUCH FOR PARTICIPATING IN THIS SURVEY!

Interviewer's Observation Notes

(Include body language and physical environment) **_ACHIEVE**