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FROM WASHINGTON CONSENSUS TO RELATIONAL ECONOMY: RELATIONAL AND HUMAN ECONOMY APPROACHES TO ADDRESSING POVERTY AND INEQUALITY IN SOUTH AFRICA

By

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Dedicated to Ouma Marietjie Geyser

(22.02.1930 – 15.05.2018)

You would have read this and given me feedback

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The phrase “Blessed are the peacemakers” (Matthew 5:9) held great significance for me during the process of writing this PhD. It captures not only what we should do, but it is intertwined with who we are and to whom we belong as peacemakers. Kenneth Bailey explains, “Peacemakers are different from peacekeepers and pacifists. Peacemakers work for healed relationships at all levels…” This PhD would have meant little if it were not for relationships. This has been not just a three-year journey, but a thirty-year one. It involves “all sorts” of people, in “all sorts” of places, and all the time to shape what is in these pages. Throughout, I have seen the value of connecting, building storylines and knowledge, mutual respect, participation, and finding commonality in a world that seems very disconnected despite all the connection.

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DECLARATION

I, **Marlie Holtzhausen**, declare that this thesis is my own unaided work, both in conception and execution. It is being submitted for the degree of Doctor of Philosophy in the Department of Political Sciences at the University of Pretoria, South Africa. It has not previously been submitted for any degree or examination at this or any other university.

Marlie Holtzhausen

Pretoria, April 2020

ABSTRACT

This research sought to examine how development occurs when it takes place from a relational approach. The relational approach forms part of a growing body of literature within development studies in search of alternative ways of understanding development. Orthodox theories tend to be resistant to alternatives that threaten their path dependency. Development-related ideological traps have also locked development policy in redundant arguments. Development theories from various disciplines continue to grapple with the multidimensionality of poverty and inequality, but they often fail to consider the central role human relationships play in approaching these issues.

This study used Relational Thinking and relational and human economy approaches in search for alternative models and methods to the neoliberal tradition and current development enterprise. Increasing global inequality and deprivations create a vital opportunity to think of new perspectives, interpretive categories and predictive models.

A case study approach was used to examine the relational dynamics of a nongovernmental organisation (NGO) called the James 1:27 Trust, which works with children and youth in Pretoria, South Africa. Relational Thinking was utilised within an interpretivist philosophy using a mixed-model approach, including the Relational Proximity Framework survey (quantitative tool) and in-depth qualitative research through semi-structured interviews and a focus group.

The research established that development studied from a relational perspective deepens understanding of the varying meanings that people give to development. It informs a relational economy in which development is seen as a circular, "messy" and often unpredictable process where belonging, pain, "family", forgiveness and learning in an intricate, embedded network of relationships are valued beyond material resources. Development requires philosophies and measures that enable the identification of questions, problems and interventions that are not currently considered in studies on development.

KEYWORDS: Development, poverty, inequality, relational approach/thinking, Relational Proximity Framework, human economy, alternative economy, Human Development Index, holistic care, South Africa.

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CHAPTER 1: INTRODUCTION

1.1 Introduction

This research follows the growing viewpoint in the development discourse that the global development enterprise is limited conceptually and fails to deliver on the implementation of development in practice. Poverty and inequality have also not been resolved, and it seems that the development impasse continues to entrench itself. However, emerging voices are searching for innovative thinking and solutions to the development impasse. In the literature, alternatives are presented from highly pluralistic disciplines and often from radically different world views. It includes terminology such as the human economy (Hart, Laville & Cattani 2010), social economics (Lutz 1990), social and solidarity economy (Satgar 2014), well-being economy (Fioramonti 2017), economic direct democracy (Boik 2014) and relational economy (Mills & Schluter 2012). These alternatives directly contest the so-called Washington Consensus, which refers to a set of free-market economic policies supported by prominent financial institutions such as the International Monetary Fund, World Bank and US Treasury (Williamson 1989).

Among emerging voices, this research contends for a deeper understanding of relationships between people and groups to add new perspectives, categories and predictive models to the study of development. In the literature on development alternatives, this research positions itself within the Relational Thinking perspective and incorporates a relational approach and human economy approach as part of the outlook. From a relational perspective, society and the economy are understood as embedded within complex systems of relationships, which allows for much more holistic approaches to inequality and poverty (Brown & Garver 2009; Mills & Schluter 2012). Relational Thinking provides the conceptual lens of the study, and the relational approach provides a specific framework (called the Relational Proximity Framework) through which to understand and measure relationships. The focus is on understanding development not in terms of growth or well-being, but in terms of healthy relationships – a society functions well when relationships are healthy.

The unique contribution of this thesis is the use of a relational perspective in development to analyse the dynamics and quality of relationships between people within the development sector both conceptually and practically. The study aims to use empirical tools that allow for more sophisticated ways of studying and understanding people's reactions and responses from

a relational perspective. The research suggests that relational development and ideas such as relational poverty and relational inequality form the basis of societies and economies. Therefore, development concepts and instruments are needed to enable better understandings of the quality of relationships between people, which this study aims to do.

This research contributes to political science as a discipline. The study's focus on development is understood as fundamentally and explicitly a political process, embedded in, and mutually interacting with, a network of socioeconomic relationships. Although "development" has a number of varied dimensions, definitions and approaches, it remains an inescapably political process in which the "purposive interaction of people, power and resources, in diverse cultural and historical contexts, shapes the pattern and the outcomes at any given point" (Leftwich 2005: 573).

However, politics and economics of development have drifted into their own "detached domains" removed from interdisciplinary contexts – which has limited the extent to which development has been studied, especially in so-called "developing" countries (Leftwich 2005). Since the 1980s, development efforts faltered in many parts of the world, and instead of reverting to development economics or neoclassical orthodoxies, this study joins voices recognising that non-economic factors – primarily political, social and cultural – need to be more fully comprehended. This research remains within the realm of political science, but also attempts to incorporate it into an interdisciplinary approach to deepen the understanding of society-wide interactions and relations as they promote or restrain development.

As will be explained in section 1.6 of this chapter, Relational Thinking was inspired by events happening in the 1970s in Kenya in search for social and economic policy environments that influence a society's capacity to build healthy relationships. This has implications on state and societal relations and how we think about generating, assessing, and reporting on the health of relationships within and between different sectors in society.

This study used a case study approach on a micro level to deepen the understanding of how people in the development sector view relationships of care, but a relational approach can lead us to raise questions on how the relationships between different actors in the development sector shape development. Section 2.2.3 of chapter two briefly discusses some of the views on the activities performed by the state, the market and civil society. Debates on the role of

different actors in development remain varied and inconclusive, but central to the argument is that mainstream development discourse focuses on growth and industrialisation, which emphasises a state-market configuration. In the literature on development, both the state and market are viewed as powerful and important forces of development (see chapter 2, section 2.2). In the dominant discourse on development, debates are often around how much state intervention and how much market involvement is required to stimulate and increase growth, alleviate poverty and create jobs and what other interventions (such as health and education) are necessary to ensure that there is growth.

This research aims to gain better understandings of the interactions between an NGO and its "beneficiaries". But a relational lens suggests that we need better understandings of all the relationships of those involved in development, including the relationships between the government and NGOs, and the government and "beneficiaries". This could even be extended to other actors such as that of business and their relationship with government, NGOs or "beneficiaries". It raises questions such as how the interactions between the different people and groups shape development, and what relational aspects such as communication, continuity, knowledge, power and purpose in relationships tell us about what is and what is not working in development interventions. Generating deeper understandings of the relational dynamics between the different actors raises further questions on the implications and impact on policy development and implementation in the development sector.

The research focused on relationships in the development sector in South Africa and used the James 1:27 Trust as a case study. The advantage of a case study is that it is an intensive and in-depth study on a particular "unit" to get a more complete picture of a situation, a phenomenon or event (Jacobsen 2002). The James 1:27 Trust is an NGO and social enterprise located in Pretoria, South Africa with practices, ideas and conceptualisations for finding a more relational economy approach to addressing issues such as poverty and inequality. It includes ideas such as developing a care economy. The organisation insists on moving away from current economic development models, which see growth as primary and social and ecological well-being as subordinate, towards creating a platform that promotes a large-scale shift towards human well-being (CEC 2017; Wartenberg 2011). Following French sociologist Marcel Mauss' (1990) scholarly work *The Gift*, the James 1:27 Trust promotes a human society based on collective exchange practices, which focus on an analysis of economic practices that have a common central practice centred on reciprocal exchange.

Within this context, the views, ideas and practices of the organisation were studied critically. The research based its findings on a case study within an interpretivist philosophy using a mixed-model approach. The aim was to critically analyse the James 1:27 Trust as part of a relational and holistic approach to development. The thesis joins alternative voices in the literature that are attempting to shift the focus to the global south and their unique contributions to poverty, inequality and other development problems.

This chapter will start by explaining the significant challenges in development theory and practice to show the importance of considering emerging development alternatives with much greater rigour. The problem statement will be followed by the research questions and research objectives of this study. The main concepts of this study will be explicitly defined as they relate to this study and include relational definitions for development, poverty and inequality. The conceptual foundation of this study will then be explained in more detail to clarify the meanings of relational thinking and relational and human economy approaches.

1.2 Problem statement

The problem of increasing levels of inequality, poverty and unemployment has been high on the agenda of development theorists in their quest to find solutions to the underdevelopment problem in contemporary society. Since the 1950s, different approaches to development have been followed in understanding and addressing the underdevelopment problem (Atkinson & Hills 1998; Cowen & Shenton 1996; Escobar 1995; Frank 1966; Hettne 1995; Hunt 1989; Martinussen 1997; Rostow 1960; Todaro & Smith 2011; Wallerstein 1974). The answer to high poverty and unemployment, so argued the towering development theorists of the 1950s through to the 1990s, was sustained growth.

Development theory and practice have increasingly shifted focus towards more complex and integrated understandings and measurements of development. This shift has occurred cautiously, retaining traditional undercurrents that have rendered the development enterprise suspect. Although the terminologies and concepts in the search for the legitimacy of development have changed, the traditional influence remains mostly intact.

Three decades after David Booth's call, towering theoretical postulations still forge forward, contesting for policy and influence, even as they advance development contradictions in society. Even after the 2008 financial crisis, institutionalised theories of development have not produced meaningful solutions or tools to resolve problems of development. Neoliberal scholars have even expressed unease with the negative impact of the growth club policies (Grzegorz 2011; Stein 2014). Mainstream development theories emphasise addressing poverty and inequality using terms such as "inclusive growth" and "poverty reduction", but the proposed solutions are framed within the same economic thinking. The neoliberal obsession with growth (as understood in terms of Gross Domestic Product) is seen as being primarily responsible for development contradictions in society, at least from among neo-Marxist scholars (Fleming 2016; Harvey 2005; Kotz 2015; Satgar et al. 2014).

So-called "developed countries" that have been proponents of neoliberal and "trickle-down" policies, such as the United States and the United Kingdom, are ranked within the top ten most unequally developed countries in the world (OECD 2019). The wealthiest 1% of American households own 40% of the country's wealth, which is higher than it has been at any point since at least 1962 (Wolff 2017). The rise in inequality over recent decades is evident in many affluent economies. It has affected not only economies with a history of relatively high inequality, but also countries where traditionally there was less inequality, like Denmark, Germany and Sweden (OECD 2015).

There are also some worrying contradictions within developing countries with roaring growth on the one hand, and on the other, the persistence of poverty, and the increase of inequality and unemployment. Inequality has grown in emerging and developing economies. In recent decades, the economic rise of countries like China, Brazil and India has reshaped the global economy. Among its most striking effects has been the sharp fall in the number of people living in absolute – or dollar-a-day – poverty and the emergence of a new middle class. However, poverty has not gone away. Indeed, in many emerging and developing countries, relative poverty is proving stubbornly resistant and inequality, too, is widening (OECD 2015). Many African countries are regarded as unstable, yet more than half of African countries have GDP growth rates above 4% (CIA 2017b).

Increasingly, studies have shown that economic growth does not necessarily translate into poverty reduction, as was initially argued (Fauzel, Seetanah & Sannassee 2015; Sharma and

Gani 2004). This fact has led to several studies that have examined the relationship between poverty and other economic variables such as economic growth, inflation, interest rates, trade, foreign direct investment and financial development (Dollar & Kraay 2001; Gohou & Soumare 2012; Jeanneney & Kpodar 2008). Further recommendations to address poverty, inequality and unemployment in developing countries include boosting productivity, employment and labour-market efficiency; improving education, health and social protection or safety nets; and improving survey data for evidence-based policymaking (The World Bank 2015).

However, the recommendations still tend to view issues through linear and reductionist lenses. Despite, for example, a 4.3% continental average growth and notions of a rising middle class in Africa, the notion of an "African middle class" is precarious. The emphasis on the financial or monetary aspect of the middle class does not consider social status, cultural norms, lifestyles and political orientations, nor does it take into account the poverty of past generations and having to take care of future generations (Melber 2017). As one of Africa's "stable" and "success" stories, Botswana maintained one of the world's highest economic growth rates since independence with 9% GDP growth between 1966 and 1999, and yet over 20% of the population still live in poverty (CIA 2017a). Although Botswana has been able to reduce poverty through various interventions such as education, health and social protection, large numbers of people still live marginally above the poverty line and risk falling back into poverty. Botswana is also still one of the most unequal countries with a Gini Coefficient of 0.60, and the unemployment rate is at 17.7% (World Bank 2015, 2018).

Similarly, South Africa forms part of the global problem of development. Despite all the research and efforts, South Africa's poverty, unemployment and inequality remain high two decades after political liberation. During apartheid, South Africa was able to grow and industrialise due to the creation of a system that was profoundly unjust and unequal through systemic exploitation and exclusion of the majority of South Africans (Terreblanche 2002; Mbeki 2009). The inequality created by the system was a great contributor to the dismantling of apartheid. Since 1994, the South African government has framed social reform policies off the premise that poverty and inequality are unacceptable, and that South Africa requires a new path of inclusive development. However, this has not transpired. Instead, high levels of inequality, poverty and unemployment persist. The South African economic and political discourse still fall within the global development enterprise rhetoric of institutions such as the

International Monetary Fund and World Bank when it comes to growth, policy and social spending, with the expectation that it will deliver different outcomes.

Growth and the excessive focus on income inequality fail to account for the complexity of inequality and the much deeper levels at which it must be addressed. Wilson and Cornell (2012) use Braam Hanekom's identification of the four pillars that perpetuate inequality in South Africa, namely: structural causes, education, psychological reasons, and the moral fabric and values of the South African society. They argue that the economy should be located in a network of gendered, spatialised and racialised relations. South Africa finds itself at a critical juncture; creative, innovative, and even radical solutions are necessary if new economic territory is to be discovered, rather than seeing the current poverty and inequality sustained or perhaps deteriorating further. Emerging discontent suggests that alternative solutions to the problem of high inequality, poverty and unemployment should focus on holistic approaches to the well-being of people, societies and the environment (Hart, Laville & Cattani 2010; Satgar 2014; Fioramonti 2017; Boik 2014; Mills & Schluter 2012).

Alternative solutions are inevitably necessary if different outcomes are to be realised. The obsession with *homo economicus* in the John Stuart Mill sense precludes development from finding meaningful and sustainable solutions to poverty and inequality, both of which remain the biggest threat to human society in the 21st century, no less than they did in the 20th. The focus of academic and economic research is, therefore, shifting away from growth to finding other ways of measuring "progress" within society. Increasingly within the literature, scholars are challenging economic determinism and its focus on the materiality of the economic, while insisting on reconceptualising poverty and inequality (Boulanger 2008; New Economics Foundation 2017; Stiglitz, Sen and Fitoussi 2009; UNDP 2010; United Nations 2015). New scholarship that critiques neoliberalism and seeks developmental alternatives show that Fukuyama's "end of history" is not final and the impasse to development does not have to persist. The above provides important arguments for why the development enterprise should employ different lenses, methods and questions in understanding and addressing poverty and inequalities within societies (Eisenstein 2014; Fioramonti 2013, 2014; Fraser 1996; Fredman 2007; Hart 2013).

In following alternative development solutions, this study relies on two approaches. The first and central approach is based on Relational Thinking and the Relational Proximity Framework

as a conceptual framework. This approach will be used as a quantitative research tool, but it will also analyse the data qualitatively. The second approach is based on a human economy approach as an "emerging tradition" within the social sciences, and is used as a qualitative approach.

The study employs the above approaches to gain deeper insights into questions that are either not considered or neglected in development philosophies, measurements and interventions. The research questions, research statements and conceptual explanations below will pave the way to explore how the study on relationships between people in development can inform a relational economy.

1.3 Research questions

The research puzzle that this study wants to solve is the following: how can a relational approach inform and guide the understanding of development? The following key questions drove the research:

1) What are the relational dynamics between the James 1:27 Trust and household members?

2) How do Relational Thinking and the Relational Proximity Framework provide a deeper understanding of the relational dynamics between different people and groups?

3) To what extent do perceptions on the quality of relationships between people influence and impact development?

4) What are some of the fundamental indicators often ignored by development theory and practice?

5) How do relational dimensions and indicators relate to development theory and practice?

1.4 Research aims and objectives

This research aimed to explore a relational approach to the study of development. Given the above focus, the main objectives of this study were to:

1) Examine the relational dynamics between the NGO (James 1:27 Trust) and the households under their care.

2) Utilise Relational Thinking and the Relational Proximity Framework as the method to understand the relational dynamics between different people and groups.

3) Analyse how perceptions on the quality of relationships between people influence and impact development.

4) Reveal methods and indicators that development studies do not often consider.

5) Understand how relational dimensions and indicators relate to development theory and practice.

1.5 Introduction of main concepts

The following concepts and definitions were applied throughout the research study.

1.5.1 Development

Section 2.2 of chapter two provides a brief overview of the different understandings of development before offering a detailed discussion on the various tenets of development theories from the 1950s. It is clear from the discussion that development is a contested concept, but in the literature on mainstream definitions of development, it is often referred to as a process aimed at improving the quality of life of individuals, communities, and countries. This is achieved through certain goals that require policy interventions to ensure the improvement of the quality of life of people (Sumner & Tribe 2008: 9).

Although "quality of life" and "well-being" is included in most definitions, as discussed further in chapter two, growth has been central in the understanding of mainstream development theories. The growth of a country is linked to increasing income which is generated by the production of economic goods and services in a country which leads to a better quality of life and material well-being (Rostow 1960). This understanding of development has shifted to more comprehensive definitions of development due to the work of economists such as Amartya Sen (2005), which includes socioeconomic understandings of development. In this view, economic growth is an aspect of development, but outcomes and policy interventions (such as improved education and health) form part of development. The above definitions are useful but limited because the focus is largely on the *material* well-being of people.

In this thesis, development will be defined in relational terms. The chosen definition intentionally moves away from individualistic and economic understandings and measurements of development. Material well-being remains important, but development is linked closely to the idea of "relational well-being". It considers the quality of social, political, and economic relationships, as well as relational deprivation, not only through income, or individual freedom and choice but also from a relational perspective. A relational definition of development seeks to understand the quality of relationships within which a person lives, in families, households, communities, ethnic groups, the workplace, between generations of people, in government and between sectors such as government, business and citizens. In the above understanding of development, human flourishing and well-being are not enough, as they relate only to the individual. In this sense, the goal of development is to create the environment and conditions in which every person has the freedom to seek the better human future they desire (Sen 2005). This understanding of human flourishing and well-being is paramount, but in this research, development is not simply about growth or material well-being, but about healthy relationships.

The shift towards a relational approach requires working with data and indicators not always considered in development measures. This research will thus use the Relational Proximity Framework, which is explained in chapter four (Ashcroft & Schluter 2005; Schluter & Lee 1993). In this study, the argument is that development should not focus only on individualistic or collectivist understandings to quantify how well people or nations are doing, but must study the well-being of people in terms of the perceived wellness of relations between people – this is termed a relational approach (Ashcroft & Schluter 2005). More specifically, the study seeks to understand what relationships tell us about development and the meanings that people give to development.

Development viewed through a relational approach also shapes how poverty and inequality are defined.

1.5.2 Poverty

In this research, poverty is defined in relational terms. The study does not dispute the fact that financial poverty leads to human suffering (hunger, malnutrition, disease, premature death) or that income poverty makes it difficult to participate in family and community life when at an

extreme. There is an overlap between financial poverty and relational poverty. However, people can be finically rich and relationally poor (see studies on older people and loneliness, such as the National Poll on Healthy Aging in the USA 2019 and National Institute for Aging 2019). Some can be financially poor people but relationally rich. An example of this is a study in Singapore that revealed that children from low-income homes excel academically despite their disadvantaged environment due to their relational contexts and the sense that they are connected "agents" within their family. Their sense of connectedness and the awareness of their circumstances motivated them to work hard and manage their limited financial resources in creative ways. The findings challenge dominant discourses on poor children as passive victims and suggest new ways to examine the relationship contexts that support children's capacity rather than focusing on individual traits (Cheang & Goh 2018).

Poverty is defined in this study as both a relational and a material condition where the poor are those who are most marginalised, who lack emotional, relational and financial support and who are most vulnerable to exploitation. Poverty is understood as a complex combination of causes and effects that include not only the relational and financial needs of the poor but also the underlying relational injustices and marginalisation that contribute to it.

1.5.3 Inequality

Relational inequality is closely linked to poverty as it relates to power, powerlessness and the process of marginalisation and deprivation, which affect inequalities between individuals and groups within society. Inequality on micro and macro levels include how relationships shape access to various resources, participation, relative bargaining power, capacities, opportunities and the consideration of factors putting pressure on relationships (Hulme, Moore & Shepherd 2001). Relational inequality on a broad level manifests in conditions such as the exclusion of certain people and groups' involvement and participation in society, loneliness, isolation, abuse or neglect. It also includes adverse inclusion and how some people and groups are engaged within states, markets and communities and their (in)capacity to shape the terms of these interactions (Du Toit & Hickey 2006; Ludi and Bird 2007; Shepherd 2006). Relational thinking views inequality not just from an individual or communal perspective but as the interrelation between individuals, groups and organisations in terms of the dimensions of relationships (communication, continuity, knowledge, power and commonality) (Schluter 2006).

1.6 Relational Thinking as a conceptual foundation of the study

Relational Thinking suggests a shift where social structures are understood not in terms of individualistic or collectivist understandings, but in terms of healthy relationships: a relational approach (Ashcroft and Schluter 2005). Development indicators (such as Gross Domestic Product and Gross National Product, Genuine Progress Indicator, Human Development Index, Index of Sustainable Economic Welfare and Happy Planet Index, and so forth) attempt to measure how well people and countries are doing. However, too often they focus on either the individual or society in their attempt to quantify how well people or nations are doing instead of focusing on the health of relationships within societies.

Relational Thinking is a social philosophy that places relationships at the centre of the thought universe, and economic and financial concerns must serve that priority. Relational Thinking also provides the conceptual framework to explain the importance of relationships and views social, economic and political patterns as a coherent and interconnected system that should build social bonds and, in turn, build societies. Relationships start from the personal (husband-wife, partners, parent-child, employer-employee, king-citizen, offender-victim, lender-borrower) to group relationships (city-tribe-nation) (Schluter 2012).

The relational approach is then the assumptions, methods and data collection tools that inform this research and its analysis. Underlying a relational approach are four presuppositions about the nature of human beings. First, all human life has intrinsic value and dignity. Second, interpersonal relationships are of primary importance to both individual and societal well-being. Third, healthy relationships depend on the presence of both obligation and choice in the social structure. Fourth, a good relationship is to be understood primarily from a moral point of view (Schluter and Lee 1993).

Based on these presuppositions, the Relational Proximity Framework was developed to understand and measure relationships and its impact on individuals, stakeholders, organisations, ethnic groups and nations, among others. Relational Thinking suggests understanding social structures and how well people and countries are doing in terms of the health of relationships. Throughout this research, “healthy relationships” will be defined according to the Relational Proximity Framework as a sense of connection between individuals and groups, a shared story, roots and reliability within the relationship, mutual appreciation,

understanding and predictability, mutual respect and fairness in the relationship and a shared identity, unity and purpose in the relationship (Relational Analytics 2017).

As a framework for social order, Relational Thinking was "inspired" by various events. In the 1970s in Nairobi, Kenya, a group of Christian students were asking questions about what they should "become" to bring about the change and development they wanted to see in Kenya. Some of the options included becoming Marxists following neighbouring Ethiopia's revolution. Others looked to the "ujamaa" socialism of Julius Nyerere in Tanzania or the capitalism of Jomo Kenyatta in Kenya. Relational Thinking became part of a critique of existing models and finding an alternative to Marxist and capitalist theories of development. It was also a search for social and economic policies and creating environments where relationships established could sustain desired outcomes (Ashcroft, Childs, Myers & Schluter 2017). As part of the discussions in the 1970s in East Africa, the following questions were raised:

> "If, from an ethical starting point, the goal is to create the right set of relationships, how might we best describe 'right relationships'? And how do land ownership, capital markets, finance, employment regulation and other policies influence a society's capacity to build such relationships?" (Ashcroft et al. 2017: 31).

The students believed that social reform as a response to human need required an understanding of what constitutes "right" relationships. It should also offer a paradigm of a relational social order where relationships are vital in setting the goals for individuals and society and in setting the agenda for a social order designed to sustain those relationships.

Following from the above, the Jubilee Centre was established in 1983 in Cambridge. Through the Relationships Foundation and Relational Research think tank, Michael Schluter and his team have coined the term Relational Thinking and have been working for the last three decades on a relational tool called the Relational Proximity Framework that helps organisations, schools, companies, and other initiatives to understand, manage and measure stakeholder relationships (Ashcroft et al. 2017). The ability to measure relationships between people, or within or between organisations, generates insightful and robust empirical data about a seemingly intangible aspect of organisations and allows for a more dispassionate exploration of how an organisation is functioning relationally (Relationships Foundation 2019).

Intuitively, people understand the importance of relationships and significant research has been done in various fields and disciplines on the importance of the quality of relationships between people, groups, communities and institutions. Margaret Wheatley (2006: 1) explains the importance of relationships:

> "The scientific search for the basic building blocks of life has revealed a startling fact: there are none. The deeper that physicists peer into the nature of reality, the only thing they find is relationships. Even sub-atomic particles do not exist alone. One physicist describes neutrons, electrons, etc. as "… a set of relationships that reach outward to the other things." Although physicists still name them as separate, these particles aren't ever visible until they're in relationship with other particles. Everything in the Universe is composed of these "bundles of potentiality" that only manifest their potential in relationship."

However, it is difficult to show in what ways relational arrangements and positions are important or what the effects are of relational interactions, interventions or support at certain times or over the long term. It is, therefore, difficult to measure the importance of relationships. Schluter and Lee (1993: 58) acknowledge the difficulty of describing what "good" relationships mean, but explain that it includes the health of emotional attachments to people, the functionality of relationships and how people are treated in relationships on local and global levels. Values such as fair play, trustworthiness, honesty, respect for dignity, honour, courtesy, commitment, reliability, altruism and reciprocity still seem to resonate with what is viewed as part of positive relationships (Schroeder et al. 2019).

Relational encounters are shaped by experience (memory) of past encounters and the expectation (imagination) of future encounters. The "other" is known or knowable, while the action of each can affect the other within some shared context or motivation. At a deeper level, it is necessary to work from the inside out by understanding why relationships are psychologically crucial to human beings and how people influence them. Psychologist Roy Childs approaches questions about relationships in the following way:

> "Relationships are shaped by the actions and responses of individuals. These are the product of the 'relationship with self' – the pattern of needs, fears and desires that

> governs our choices and behaviour. Understanding the person is an important and valuable way of understanding the relationship. To give ourselves a fighting chance of building good, healthy, productive relationships we therefore need to come at them from three directions – from the outside in, from the inside out, and from in between. We need to understand how to create an environment in which relationships flourish. By combining the approaches of structural systems (from the outside in), psychology (from the inside out) and organisational development (from in between) we have identified a framework for deconstructing the way relationships between individuals or organisations and within groups work" (Ashcroft et al. 2017: 32).

Ashcroft et al. (2017: 32) further state that increasing well-being and fixing "broken" societies require an understanding of how people shape the environment in which they relate to others, which is looking at the relationships from the outside in.

Authors within the Relational Thinking paradigm have sought to explain why relationships matter not only on a personal level but also as a part of social analysis. For example, legislators passing laws on crime control often do so without considering what kinds of relationships encourage crime or tend to produce criminals (Schluter & Lee 1993). Schluter and Lee (1993) contend that even material aspirations translate into relational categories such as using money to express love and to secure influence or respect. The presence of relationships will always be critical in maintaining a person's well-being. Much of people's performance, how they feel, employment, education, child-rearing, surviving a crisis, and so forth, depends on the support from those who are close to the person. A functioning democratic and economic system, therefore, requires a transformation in the working of financial markets and the structures and operation of corporate business to ensure in principle that there is "no investment without involvement, no reward without responsibility, no profit without participation" (Schluter 2012: 1).

Relational Thinking is a proposal to a fundamental shift conceptually, ideologically but also through practical instruments to tackle the root systemic causes of social, economic and political problems. The aim is to create a shared account of the common good that resonate with many different world views, religions and perspectives who also value relationships as the key to ordering societies (Ashcroft & Schluter 2005).

With the above in mind, Keith Hart and John Sharp (2015: x) argue that it is not enough to rely on impersonal states and markets, but that there is a tension between "impersonal conditions of social life and the persons who inevitably carry it out". Hart et al. (2010) use the term "the human economy" as an emerging paradigm, which developed from the World Social Forum in 2001 and obligates a more detailed study and consideration of alternative socio-economic ideas to "… explore economy from the vantage point of people's concrete activities and aspirations…" while also extending the range of inquiries to "take in the human predicament as a whole" (Hart & Sharp 2015: vii). The human economy is the outcome of ongoing grappling for the need to find an alternative to the impasse of development which was initially expressed through ideas such as a solidarity economy, people's economy and gender studies. It shifts the focus to the global south and their unique contributions to inequality and other development problems. The human economy approach and how it will be used in this study will be explained in more detail in chapter three (section 3.3). It is important to note that "people-centred approaches" to development are inexhaustible and varied. However, the human economy is very encapsulating, and this research has "ring fenced" human economy and relational economy as lenses used in this study. There are terms that will be defined and applied within the study, including social economy, solidarity economy and care economy, but these terms also fall within human economy as people-centred approaches.

With this inference in view, this research joins increasing voices that search for meaningful pathways to understanding and approaching the pressing development issues of poverty and inequality.

1.7 Limitations to the study

There are several limitations to this study, including that the researcher's involvement in the Trust posed certain risks and biases, this study is limited to a case study and only one organisation in the development sector and that the study also relied on the subjective analysis of relationships. The limitations will be discussed in more detail below.

The researcher's involvement in the Trust posed certain risks and biases. The researcher was conscious of these risks and approached them through the lens of "critical subjectivity" (Reason 1995: 12) and as part of "embedded research" (see chapter four, section 4.5). With this in mind, various steps were taken to minimise researcher bias through multiple data collection and

analysis techniques. A triangulation mixed-methods design was used, which included a wide range of sources, such as a document analysis, mixed-method research, the human economy participant observation approach, and a human development indicator framework, which will be explained in chapter four.

Another limitation is that the research only uses one case study and one organisation within the development sector. There are limits to a case study approach. Flyvbjerg (2006) argues that one cannot generalize from a single case. The case study is most useful for generating hypotheses, whereas other methods are more suitable for hypotheses testing and theory building. Questions remain on how a relational approach could be employed in the development sector beyond one case study. If relationships within human development became central in the study of development, it also requires a better understanding of the relationships between all those who are involved in development. This includes relationships within and between government and business, between government and its citizens, and between different sectors of South African society to rethink human development along relational lines. This study is not simply about the NGO sector and for this reason does not provide an extensive literature review on NGOs (see chapter three, section 3.6 for a brief overview on the literature on NGOs). The focus of this study is more broadly focused on development and seeks to explore a relational approach in the development sector. Focusing on an NGO as a case study within a qualitative study provides a microscopic focus on a unit that enables greater understanding of what happens in broader development.

Together with the above, the research is also limited to only measuring and analysing certain relationships within the Trust. The study focused on the relationships between the Trust and the household members under their care. However, there are many relationships in the Trust. The Trust has various stakeholders including people who sponsor the care, partner organisations, the board of the Trust and various social networks who are involved in the organisation. Household members also have other relationships in and beyond their communities that were not considered in this study. It was evident from the in-depth research that the “other” relationships have implications for the development and care relationships of the Trust and household members, but it moves beyond the scope and focus of this study. The Trust wants to expand what they are doing, which means that further research will be required into other relationships for a more holistic and integrated understanding of development practice and its implications on care interventions.

A further limitation is a focus and reliance on the subjective analysis of relationships (how people feel about the sense of respect in the relationship on a scale of 1 to 6). It provides insights into how the relationships are viewed but will not be sufficient in terms of translating relational goals into decisions in terms of governing policy priorities, project selection and resource allocation. Relational measures are more difficult to observe, and perceptions of relationships are valuable but remain limited within decision-making. Proxy measurements (which are indirect measures of the desired outcomes, which are themselves strongly correlated to that outcome) should also be considered in future research together with the subjective analysis of relationships. The proxy measurements should be used to promote the ultimate goal, which is healthy relationships. Schluter (2012) suggests other proxy (relational well-being) measures in addition to measures such as gross inequalities in income, assets, education or access to healthcare, which are symptomatic of injustice that makes it difficult to achieve a healthy relational society. It includes the following suggestions:

- Intra-family trust/commitment – marriage rate, divorce rate, birth rate, levels of household debt.
- Social isolation of older people – number of contacts per week, percentage who feel lonely.
- Workplace relationships – extent of absenteeism and pay differentials in organisations.
- Gender relations – incidence of domestic violence/rape/prostitution, hits on pornographic websites, gender ratio at different educational levels.
- Intra-community relations – crime levels, proportion knowing names of neighbours, incidents of vandalism, percentage drug addiction, suicide rate.
- Inter-racial/ethnic relations – incidents of racial/ethnic violence, comparative income/education levels.
- International relations – aid (including private charity) as proportion of GDP, levels of carbon emissions, flow and treatment of migrants, cost of a visa.

As will be discussed in chapter four, section 4.4.2, the RPF has already been used in various contexts and settings and is starting to generate more quantitative data to enable further analysis and inferences to be made between the quality of relationships and other indicators that support greater well-being of people. It includes studies in health, education and business

(Relationships Foundation 2019). However, most of the data produced is still from higher-income countries. To the best of this researcher's knowledge, this is the first systematic assessment of development through a Relational Thinking lens in South Africa, which could be extended further in this context. The growing volume of data globally using various development indicators provide an opportunity for comparative analysis linkages and correlations, but there are also limits to the depth and insights that can be gained from large, quantitative studies, which means qualitative research remains an important aspect of research conducted.

1.8 Research structure

This thesis is organised into seven chapters. This first chapter has problematised and contextualised the research question to give a clear outline of the scope and focus of the research. The chapter identified the study problem, research questions and objectives; it presented the terminologies that recur in the study and put forward the conceptual foundation for this thesis.

Chapter two, Development Theories and Implications on Development Practice, will examine the literature on development theories and implications on development efforts today. This chapter will situate the research within global debates on development, poverty and inequality and highlight the mainstream theories' resistance to alternatives to employ Relational Thinking into debates on development as a way to confront such resistance.

Chapter three, The Fault Lines of Development Theory and Practice, will explore Relational Thinking and human economy as relational and methodological lenses in the study of development theories and practice. This chapter aims to critique development approaches, language, meanings and measures from a relational perspective to suggest relational descriptions, drivers and facets in the study of the workings and relationships of an NGO.

Chapter four, the Research Methodology, will explore the interpretivist philosophy of the study and the case study research method used in this research. This chapter aims to describe in detail the various research techniques, sampling methods and data analysis techniques employed to gather data from an NGO called the James 1:27 Trust. It will also highlight the ethical considerations of this research and reflections on the collection and analysis of the data.

Chapter five, In Search for Legitimacy of Development Concepts, will be based on the primary research of this study to examine some of the relationships within the James 1:27 Trust through Relational Thinking and the Relational Proximity Framework. This chapter will use the formation, development and continuum of the Trust to critically analyse some of the development concepts used by the organisation.

Chapter six, Exploring a Relational Economy through the Relationships of People in the Development Sector, will analyse the relationships in an NGO in South Africa called the James 1:27 Trust. This chapter will provide the research findings and present it through the Relational Proximity Framework to elucidate emerging themes from the data which could inform a relational economy.

Chapter seven concludes the research by drawing on the findings of the preceding chapters in relation to the broad focus of the research. This chapter will recap the scholarly debates, findings and limitations of the research to situate the contributions it makes to scholarship on political and development studies. Drawing from the research findings, recommendations concerning alternatives in development theory and practice will be considered for future research.

CHAPTER 2: DEVELOPMENT THEORIES AND IMPLICATIONS FOR DEVELOPMENT PRACTICE

2.1 Introduction

This chapter provides a detailed analysis of the literature on development theories and their implications for development efforts today. After defining development, the chapter reviews the central theoretical debates, starting with an aerial view of the development discourse stretching back to the 1950s. It then highlights why a development impasse seems to persist despite numerous attempts by the development enterprise to break the impasse. Part of the challenge lies with the linear and reductionist lenses through which development issues such as poverty and inequality are understood and operationalised.

Through reviewing the main theoretical debates, the chapter will also highlight the fault lines of the rather wide-ranging schools of thought on development, from the structuralists to the dependency theorists, to modernisation theorists and later neoliberalism. This chapter will highlight the path dependency of orthodox theories and their resistance to alternative theories that threaten the status quo. Relational Thinking will be employed in debates on development as a way to confront such resistance. This research argues that neglecting relational perspectives in development theory and practice has potentially delivered the (under)development tragedy of the last century, with inequalities and poverty rising as they have.

It is important to stress that the tenets of development are highly complex, defined in various ways, can be employed unevenly across ideological divides, and can be used to categorise a broad variety of phenomena (Lipscomb 2019). These tenets and complex concepts rest on other concepts that reference ideas and notions that are normatively charged (Weissman 1993). For example, when neoliberalism is discussed as part of mainstream development, it is a theory of political economic practice that still rests on an understanding of human well-being as best advanced by liberating individual entrepreneurial freedoms and skills. The role of the state is significant in creating and preserving the institutional framework for such practices (Harvey 2005). Those who are opposed to neoliberalism also operate from their own normative logic.

In this lies the value as well as the reasons for challenging certain perspectives. Dominant views of development have maintained its dominance due to its strong appeal and ability to reinvent itself (Kaletsky 2010). A complex and reified concept such as neoliberalism makes use of other complex and reified concepts such as freedom, individuals, markets, and the state, which is invested in moral and normative associations. Subsumed, is the belief that agents are motivated by choice and must choose wisely when they profit or suffer the consequences to their choices, which promotes responsibility (Lipscomb 2019). The above speaks to the merits of dominant development theories.

This chapter's critique on the tenets of development is, therefore, not to discredit the broad range and varying perspectives on development. However, deeper questions on the consequences of development projects and what they do are also critical (Ferguson 1996). More specifically, this research asks what relationships tell us about development through the meanings that people give to development.

With the above in mind, what seems to emerge is the dichotomous nature of literature on development. There has been a divergence of theoretical schools of thought over the last 50 years. As will be demonstrated in this chapter, the literature draws clear lines between dominant and counter perspectives on development. For example, Walt Rostow (1960) and other mainstream economic development theorists were challenged by dependency and structuralist theorists (section 2.3). These debates have not been resolved even with attempts to synthesise or reform the differing positions (see section 2.3.2). Through his seminal work, David Booth (1985) explained the development impasse and pointed to the divergent perspectives on development in the literature. The dichotomy of development is prevalent in the literature on debates such as "state" versus "market" (section 2.2.3). The divergent views in the literature suggest that development has never been a linear process. The main conclusion is that development literature seems to be frequently categorised under neoliberalism or neo-Marxism, which leaves a gap to consider relationships more deeply in development.

2.2 Defining development

Development is a contested, complex and ambiguous concept. The concept includes different understandings based on different values and conceptions. Development theories and studies are multidisciplinary and interdisciplinary to encompass the social, political, cultural,

economic, technological and other aspects of social change, policy and normative concerns (Thomas 2004; EADI 2005). Well-known authors have attached various meanings to development; Adam Smith (1761) connects development to happiness, Karl Marx (1887) to equality, and for Amartya Sen (2005) freedom is both the means of development through social and economic arrangements but also the ends in realising general welfare. French philosopher, historian and social theorist Michel Foucault (1976) challenges the entire notion of development when he critically analyses the relationship between power and knowledge as they are used in social institutions. Todaro and Smith (2011) have a more policy-orientated approach to development, focusing on how development improves the quality of life and people's living standard.

Development is a "contested concept" that means different things from one historical situation to another and from one actor to another (Hettne 2009). Swedish author Björn Hettne (2009) has written extensively on development studies and maintains that there are no fixed or final definitions of development, but rather suggestions of what development should imply in particular contexts. From Hettne's explanation, development can be conceptualised in relation to societal aims and how society perceives and intends to deal with societal problems. As a society solves some problems, new ones tend to emerge.

Development can also be understood in three different ways (Sumner & Tribe 2008: 9):
1) A long-term process of structural societal transformation, which is associated with "meta-narratives" closely linked to development in the form of industrialisation and economic growth.
2) A short to medium-term outcome of desirable targets, which is instrumental and technocratic.
3) Not a definition as such but viewed as a dominant discourse of Western modernity, which is part of the postmodern (post-development, postcolonial, post-structuralist) conceptualisation of development.

Defining and using the term "development" also raises the question of "development for or towards what?" From 1945 until fairly recently, the main focus of development was based on the assumption that low-income countries in Africa, Asia and Latin America could "develop" into the wealthy and democratic countries of the "developed West", aspiring to those same values and lifestyles. The word "development" often implicitly implies the destination of economic and social change, of which economic growth is generally regarded as the purpose

and means of social change (Schluter 2007). However, the emerging voices and those who contest the narrow economic definition of development are suggesting varied and different ways of looking at development through different lenses (Fioramonti 2013, 2014, 2017; Hart 2013; Hart, Laville & Cattani 2010; Lutz 1990; Satgar 2014; Boik 2014; Mills & Schluter 2012). These will be detailed below in the discussion on the central tenets of the various development theories through their historical development, from the 1950s until today.

2.3 The main tenets of development theories

The problem of increasing levels of inequality, poverty and unemployment has been high on the agenda of development theorists in their quest to find solutions to the underdevelopment problem in contemporary society. Since the 1950s, different approaches to development have been followed in understanding and addressing development issues (Atkinson & Hills 1998; Cowen & Shenton 1996; Escobar 1995; Frank 1966; Hettne 1995; Hunt 1989; Martinussen 1997; Rostow 1960; Todaro & Smith 2011; Wallerstein 1974).

The dominant classical and neoclassical discourses on development from the 1950s to the 1990s viewed sustained growth as the answer to high poverty, inequality and unemployment. However, by the turn of the century, questions had started to emerge around the legitimacy of traditional theories of development. Radical alternative theories offered a comprehensive diagnosis of the deeper historical problems of development, although they did not offer alternative solutions. These radical alternatives were offered mainly by the politically "left" in response to the neoliberal maxim, and they offered arguments only in the context of diagnosis without providing viable solutions (Trainer 1989).

These alternative theories include structuralist theories put forward first by Liberal reformers Raul Prebisch and Hans Singer in the 1950s, followed by dependency theories, which were advanced by Marxist Gundar Frank and World System Theorist Immanuel Wallerstein. These theories will be explained in more detail below, but it is important to note that they emerged soon after the Second World War and a counterposition soon followed.

Since the 1950s, then, there has been a contest between the mainstream and countering positions, and the countertheorists seem to have lost some of their plausibility in the 1990s. Modernisation theorists, on their part, gravitated around the implementation of neoliberal

policies in its current meaning from the 1970s and 1980s without accounting for the historical dynamics of societies. The mainstream position on development has tended towards a form of ideological empiricism but, as argued in this thesis, relies on data whose conclusions are predetermined.

During the 1980s, neoclassical or neoliberal theories reasserted dominance over other schools of thought and offered a justification to market-orientated interventions such as the World Bank and International Monetary Fund (Power 2003). Proponents of neoliberalism argued that development would best be achieved through the action of free markets, open economies and privatisation of inefficient public enterprises. Neoliberalism defended its ideological space in the 1950s through the 1970s, but in the 1980s it was given impetus by Ronald Reagan and Margaret Thatcher's political vehicle. Thatcher's "There is no alternative to Globalization" (TINA) dictum was used to promote the market economy as the only system of development that works (Knutsson 2009).

The collapse of socialism, symbolised by the fall of the Berlin Wall and the dissolving of the USSR, was used to give further momentum to the rise of neoliberalism (Berlinski 2008; Harvey 2005). American political economist Francis Fukuyama (1989, 1992), even pronounced that we have arrived at the "end of history", meaning the endpoint of our ideological evolution with the ascendency and universalisation of Western liberal democracy. Fukuyama makes strong claims within the liberal tradition, which shows the strength of mainstream dominance – if there are no other solutions, then capitalism is the only approach that curbs the search for alternative solutions within development.

The new momentum of neoliberal policies during the 1980s occurred while David Booth (1985) questioned meta-theories and argued that Marxist development studies were at a development impasse. Although Booth appreciated the importance of these theories in explaining what happens with societies in the era of capitalism, he argued that these theories suffered meta-theoretical errors and were incapable of generating viable policy (Graaff 2005). Booth (1985) then called for a return to empirical studies that should guide theory, and not vice versa. Many scholars followed Booth's argument but went further in finding new ways to overcome the impasse in development theories (Corbridge 1991; Ferguson 1996).

The impasse in development theories gave rise to new theoretical approaches, including feminism, postmodernism and postcolonialism, all pointing to a growing recognition of the heterogeneity of the developing world (Schuurman 1996). In the last three decades, further solutions have been offered, including micro theory, participatory action research, postmodernism, post-development theory and postcolonialism (Abrahamsen 2015; Chambers 2005b, 2005c, 2010; Graaff 2005; Schuurman 1996; *Stiglitz 2003, 2006, 2012*; Ziai 2015*).*

The following will provide an overview of the primary theoretical debates and consider the persistence and consequences of the impasse of development theory. The leading theoretical positions on development will be summarised before explaining the development impasse in more detail.

2.3.1 Development theories between the 1950s and 1990s

Development studies developed as a branch of economics after World War II. The focus was to reconstruct economies after the devastation of the war, and more particularly to address questions of how "poor" countries could develop, given that the reconstruction of European economies coincided with decolonisation. Macro development debates and practices integrated ideas of politics and economics and eventually branched out to scholars from various disciplines and developed into a wide range of development theories (F. Lewis 2003; Kothari 2005).

2.3.1.1 Modernisation and growth theories (1950s-1970s)

Post-1945, development was understood as progress and change through growth, which meant reorganisation, reordering and restructuring of economies (United Nations 2017). The focus was primarily on the development of developing countries. Early modernisation theories are precursors to the Washington Consensus (coined by English economist John Williamson in 1989), which focused on policies intended to help developing countries that faced economic crises through recommended structural reforms that increased the role of market forces in exchange for immediate financial help (Williamson 1989). The early modernisation theories were also linked to the broader modernisation project, underpinned by Keynesian economics, structuralism and an "elementary" version of welfarism (Saad-Filho 2010). Keynesian economics was developed by the British economist John Maynard Keynes during the 1930s in

an attempt to understand the Great Depression. Keynes advocated for increased government expenditure and lower tax to stimulate demand and pull the global economy out of depression (Jahan, Mahmud and Papageorgiou 2014).

Keynesian economics was followed by a period where the theory of economic growth was advanced through the work of English economist Roy Harrod and Russian American economist Evsey Domar. The Harrod-Domar model was a classical Keynesian model of economic growth that focused on increasing the Gross National Product (GNP) of a country through investment, which would lead to capital accumulation and the generation of growth (Hout 2016).
Methodologically, development was viewed as a transitioning process towards greater social progress and attached to modernisations' advancement of capitalism, growth and industrialisation. Poverty and inequality were framed accordingly; countries would advance and develop through various stages of growth, and this would have a positive impact on poverty, inequality and unemployment (Hout 2016).

The reconstruction of economies and polities in Western Europe after World War II led to its quick recovery. The Marshall Plan was influential in setting the stage for rapid growth in Western Europe after the war and the fact that the reconstruction of Western Europe was one of the greatest economic policy and international successes of the twentieth century (Bradford De Long & Eichengreen 1991). It was primarily because of the European success that modernisation theories became applied models of ways to transform underdeveloped societies and to deliver fast growth (Knutsson 2009). In President Harry Truman's 1949 Point Four Program, he assured international development assistance to the developing world and made it clear that industrialised countries were the blueprint for development (Rist 1997). It was widely assumed that developing countries should go through certain stages of development and these models became the example for global development.

From the above blueprint of development, a variety of related theories and perspectives of modernisation developed. The mid-twentieth century was a time in which development economics and economic history flourished, set in the context of growth and development models put forward by development economists. Estonian international economist and policymaker Ragnar Nurkse was one of the founding fathers of classical development economics. He built on the work of economist Paul Rosenstein-Rodan and promoted a "theory of the big push". Nurkse (1953) emphasised that a "big push" of massive and balanced

investment was required or a simultaneous, coordinated expansion of several sectors to ensure the growth in output and capital stock at the same rate. In *Problems of Capital Formation in Underdeveloped Countries*, Nurkse (1953) explains how the government in underdeveloped countries had to make substantial investments in several industries simultaneously to increase market size, productivity and private investment.

The economic "big push" was criticised by economists who suggested the need for unbalanced growth in development (Hirschman 1985). Economists such as Albert Hirschman (1958) did not question the reasons for underdevelopment. However, they argued that underdeveloped economies lack resources such as skilled labour and technology, making it unrealistic to expect governments to make large-scale investments in many industries in their economy at the same time. Instead, he argued, that investments should be made in specific sectors rather than simultaneously in all sectors of the economy.

During the 1950s, modernisation theories attempted to apply theory to an interpretation of economic history and to use economic history in the development of a "model" to explain the growth necessary for modernisation and the policies to promote it. Economic development provided an empirical basis to identify the main social, political and economic elements considered conducive to promoting growth (Knutsson 2009). For example, Saint Lucian economist and recipient of the Nobel Prize in Economics Arthur Lewis (1954) introduced the "two-sector-model", which prioritised the modern, industrial sector over the stagnant, traditional, agricultural sector as the engine for economic growth. Another recipient of the Nobel Prize in Economics and American economist and statistician Simon Kuznets (1956) was praised for his work on the inverted-U curve using increasing data from Western countries to measure the changes in wages and income inequality after World War II. Kuznets identified three phases of development. He argued that during the first phase of development, traditional agricultural societies would industrialise and urbanise, which would also lead to an increase in inequality. He then identified phase two as the stabilisation phase, and during the third phase, inequality will decrease. Kuznets believed that poverty would be reduced as an indirect outcome of growth because large-scale investment projects would lead to employment creation and as "trickle-down effect" reduce poverty (Peters and Adindu 2015).

From the 1960s, modernisation theories gained even more momentum through the most notable advocate of modernisation theories, American economist and political theorist Walt Rostow.

Rostow's comprehensive work was *The Stages of Economic Growth: A Non-Communist Manifesto* (first published in 1960). He built a historical-based model on the stages of development of economic systems to identify the main factors that explained the transformation of an undeveloped country to a developed one. Rostow (1991: x) argued that the transition from underdevelopment to development would pass through five stages: (1) "the traditional society", (2) "preconditions for take-off", (3) "the take-off", (4) "the drive to maturity" and (5) "the age of high mass consumption". He based much of the theory on a geopolitical outlook and the historical patterns of then developed countries, while arguing that every country can be categorised into one of the above stages.

Rostow's attempts to develop a pattern of development in the economic history of advanced nations was praised by Kuznets as a legitimate and potentially valuable exercise. However, Rostow was also criticised by many scholars (Knutsson 2009). Bauer and Wilson (1962) argued that Rostow did not define the stages of growth according to any specific criteria such as cultural or material attainment. Also, Rostow's categorisation of growth did not consider different routes of economic development based on sociological, cultural, political and other factors or external relationships with other countries. Rostow's theory further lacked historical data and did not provide a clear conceptual criterion of when a country has reached a particular stage; the analysis was also simplistic and generalised (Bauer and Wilson 1962). Rostow's success was not due to the originality of his theory and arguments but because it was rooted within a Western tradition of universalist claims and linear development thinking with the notion that "others" need to catch up (Knutsson 2009; Rist 1997).

Theorists and economists continued using the tenets of Rostow's modernisation theory but applied it differently than he did (Hettne 1995). The mainstream development theorists influenced the neoliberal movement between the 1960s and 1980s, which will be discussed in more detail in section 2.2.1.4 of this chapter.

The above theories may differ in various respects but shared the belief in planning and an interventionist state for successful development. This era was dominated by a modernisation paradigm that emphasised "economic growth, industrialization, structural differentiation and functional specialization" (Knutsson 2009: 11). However, the excessive focus on the economy and growth as progress within mainstream theories have had a collective impact that requires holistic considerations. Modernisation theories neglected that the health and "general well-

being" of a society requires healthy relationships, since relationships fundamentally strengthen societies through bonding (within families and communities) and bridging (interactions with "others" in society). Instead, the pursuit of economic, material and political goals often undermines the pursuit of relational goals. This narrow focus has undermined relationships, and has produced a range of negative consequences which are still prevalent decades later (Samuelson 2017).

Development views that counter modernisation theories have placed more emphasis on the skewed relationships between states. The arguments, however, remain within the same narrow pursuit of economic, material and political goals without seeing the problem as being related to the social relationships in which these goals are embedded. The following sub-section will provide more detail on the role and impact of critical theories on mainstream theories.

2.3.1.2 Critical theories (1950s-1990s)

Between the 1950s and 1990s, radical alternatives contested modernisation theories on development, arguing that development and underdevelopment were two sides of the same coin (Saad-Filho 2010). During the 1960s and 1970s, a critical reaction to the linear approach to development was the dependency school analysis of the "core" and "periphery" when it comes to development and underdevelopment of countries, which was further elaborated by Wallerstein's (1974; 1992) inclusion of "semi-periphery" into the analysis.

The dependency school can be traced to German-British development economist Hans Singer, and Argentine economist Raul Prebisch. The Prebsich-Singer thesis developed from two published papers written in 1949 by Prebisch and Singer respectively. They were also known as structuralist development theorists who questioned the "fairness" of international trade. The Prebisch-Singer hypothesis is well known for arguing that poor countries export primary commodities while importing manufactured goods from higher-income countries, resulting in a decline in terms of trade, income losses and impeding growth for poorer countries (Knutsson 2009). Structuralists argued further that it is not only a region or country that stifles development, but unfair terms of trade with industrialised countries where the elite dominates through an internationally connected social structure (Hettne 1995; Todaro and Smith 2011).

The theory was further developed from a Marxian perspective by American economist Paul Baran in 1957 with the publication of *The political economy of growth.* German-American sociologist and economic historian Andre Frank (1966) also promoted dependency theory from a Marxist perspective and framed it as "development of underdevelopment". He asserted that the capitalist system had created underdeveloped countries due to a lack of understanding of the history of countries considered underdeveloped, which has led to serious misconceptions about their pasts. During the 1970s, Guyanese Marxist historian Walter Rodney (1972) used the Latin American dependency model to describe Africa's underdevelopment as a result of the conscious exploitation by European imperialists.

Dependency scholars challenged the Eurocentric linear modernisation thinking as ahistorical and unable to explain the persistence of poverty in developing countries and the widening gaps between rich and poor countries (Clarke 2002; Hettne 1995; Knutsson 2009; Szirmai 2005). The countering positions to mainstream development theory and practice contended that historical experiences of the developing world were not considered in shaping relations with the industrial world. They argued that the international economy is structured around the centre or core, and that the surplus in the periphery is drained by the centre (Knutsson 2009). Poverty and inequality are linked to development-underdevelopment debates as structural differences between "developed" and "developing" countries. The relationships and interactions between countries are based on the domination of industrialised countries.

Structuralist and dependency theories had ideological significance. Both theories opened the debate on a global analysis and the understanding and influence of external factors on development and underdevelopment (Hettne 1995). Dependency theorists showed how the political and economic reality of underdevelopment is part of the world system grounded in modernisation theories.

However, dependency largely mirrored Rostow's hypothesis even if they drew contradictory conclusions (Olukoshi and Nyamanjoh 2007). The dependency school initiated a paradigmatic conflict between "growth and modernisation" versus "dependency and underdevelopment" and "backwardness versus exploitation", but both modernisation and dependency theories remain within the economic, equalling development with growth. It also underestimated the dialectics of capitalism in the growth of wealth of many developing countries in the 1970s and that the periphery can become centre, and vice versa. The notion of "development of

underdevelopment" oversimplified different realities and made assumptions about linking wealth in one area and poverty in another. Proposed strategies by dependency theorists, therefore, failed in many countries (Hettne 1995).

What followed was the search for more comprehensive understandings of development, especially from the 1970s onwards, which will be discussed in more detail in section 2.2.1.4. Before providing more detailed explanations of development from the 1970s, the below sub-section will consider literature that has not been incorporated fully into development but contributes to challenging mainstream development philosophies that have shaped development measurements and interventions.

2.3.1.3 Critical theories in an African context

This study seeks a better understanding of relationships in the development sector in South Africa, which is located in an African context. It is therefore important to draw on some of the literature that has developed as a critique of the mainstream from within this context.

A search of the literature reveals that African thought has been poorly covered in the development literature and has instead been relegated to Philosophy instead of Economics or Political Economy. Karl Polanyi, for example, who was an Austro-Hungarian economic philosopher, historian, anthropologist and sociologist, gained much greater prominence within economic theories for his cultural approach to economics from the 1940s onwards. In *The Great Transformation* (1944), Polanyi (1957) argued that the emergence of market-based societies in modern Europe was not inevitable but historically contingent. He asserted that rational self-interest is a feature of the market society and that much more attention should be given to patterns of reciprocity, redistribution, shared values and traditions, and the deterring role of community and politics. Polanyi made strong arguments based on social relationships and social motivations, but similar arguments have been made within African thinking with important claims about the importance of social relationships within understandings of how societies and economies are structured. Nevertheless, these arguments have not been as fully integrated into development debates as Polanyi's work.

Already from the 1960s to 1980s, in the literature on decolonisation in Africa, African scholars provided moral critiques on the consequences of dependency, arguing that economic and

political control by more "powerful" states are built on mental and cultural subversion, making people believe their indigenous culture is worthless (Fanon 1967; Nyerere 1973, 1967; Ngũgĩ 1985, 1986). Congolese philosopher Valentin-Yves Mudimbe (1988), for example, criticised European portrayals of African thinking and sought a process by which Africans can have greater autonomy over how they are represented and how they can construct their own social and cultural models in ways not mediated by Western epistemology and historicity. Similarly, Tanzanian academic and law expert in development issues, Issa Shivji (1989), argues in the *Concept of Human Rights in Africa*, that human rights were used by the West as a political tool to justify capitalism. He states that "positivism does not embrace the African ideology of collective rights but rather advocates for individualism" (Shivji 1989: 48).

During the 1990s, further contributions were made to understandings of development beyond the theories that were available at that point. In *The theory and ethnography of African social formations*, South African anthropologist Archie Mafeje (1991) looked at the imposition and failure of capitalism and socialism within the African context and asked, "… is our understanding of the social and cultural connotations of the various regional responses to these historical developments deep enough for us to be effective interlocutors?" (Mafeje 1991: 149). Mafeje's thoughts resonate with developments in Relational Thinking (as discussed in section 1.5 of chapter one) even if there is no direct relationship between the two. During the 1970s, aspects which resonate with Relational Thinking emerged in Kenya as a critique of existing models, since neither socialism nor capitalism seemed effective in understanding or addressing the challenges in Kenya's neighbouring countries. As a result, questions emerged on how to understand better what constitutes social relationships and offering a relational social paradigm in which relationships between individuals and groups become an essential focus for analysis of development (Ashcroft et al. 2017: 31).

Another scholar who wrote extensively during the 1980s and 1990s about how relationships needed to be central to how we think about democracy and development is Claude Ake from Nigeria. Ake (1987, 1996. 1996a) states that,

> "The idea of human rights, or legal rights in general, presupposes a society which is atomized and individualistic, a society of endemic conflict. It presupposes a society of people conscious of their separateness and their particular interests and anxious to realize them. The legal right is a claim which the individual may make against other

members of society, and simultaneously an obligation on the part of society to uphold this claim" (Ake 1987: 5).

Ake asserts that traditional and communal societies in the African context emphasise the collective more than the individual, co-operation instead of competition and concrete historical conditions rather than the abstract. Ake (1996) contends that liberal democracy is a product of industrial capitalism and presupposes a society that is essentially a market, with highly individualistic people dedicated to the pursuit of their interests, and gives priority to the individual over the collective – as shareholders in a joint-stock company. Ake (1996) believes that African societies have their own social realities, social base and unique institutional forms. Democracy in this context should be customised for the social realities in African countries and reflect their social base and unique institutional forms according to historic conditions.

The above arguments have been taken further by various authors in questioning Western concepts and methodologies and have focused on the neocolonial linkages that have persisted (Nell & Binns 1999: 389). Some have argued that the notion of development is often problematic and has paid little attention to Africa's own histories, and social and cultural legacies, to overcome the development impasse (Bracking & Harrison 2003, Bond 2006; Bush 2007).

The development impasse of the 1980s and 1990s is considered a product of developed countries' perspectives on poverty in underdeveloped countries. Consequently, "Western" development strategies and projects in dealing with poverty and inequality have been suggested and are now being questioned since they have failed to address underdevelopment. In *Africa's Development Impasse: rethinking the political economy of transformation,* Andreasson (2010) argues that debates on devising a development agenda to emerge from the impasse and address underdevelopment have often centred around state and market machineries, how they relate, how to move beyond them, or find a "mid-way" between state intervention and market freedom. Even so-called alternative politico-economic thinking and practices have failed to redress historical injustices and inequalities, since they rely on either the developmental state or neo-liberal recipes to achieve development through a market-orientated route. Andreasson (2010) believes that it is necessary to disentangle the state-market dichotomies propagated by liberal and statist theories, while deeper questions should be asked about the underlying socio-economic power structures and constraints that persist post-independence.

The above challenges the presuppositions that have shaped and influenced development within African contexts and suggest giving more attention to values that are central to African philosophy and thinking. A concept which has been ascribed to African philosophy is the term *Ubuntu*. *Ubuntu* is a nebulous concept which has been widely used and debated within literature and many paradoxes exist within the *Ubuntu* discourse (Broodryk 2010; Marx 2002). Questions remain around the meaning of the word and its utility as an "organising principle" for social and economic development (Mupedziswa et al. 2019).

The term is frequently used as a moral code in which the value and dignity of humans are placed within the larger community ("I am because you are") and the oneness of all life (Nabudere 2011, Setiloane 1978. *Ubuntu* is also viewed as an analytical lens that identifies human beings as interdependent entities with the whole of humanity but built within a cosmological community that have duties and responsibilities to both the physical and metaphysical social world (Setiloane 1978). The term extends to people's interconnectedness with the earth which means that the earth is a member of the community and humans also need to take care of the earth. All beings therefore possess the essence of life and must be valued and respected (Breda 2019). The purpose is not to "fixate" on the term *Ubuntu* as such, but rather to emphasise that African philosophies such as *Ubuntu* include a much deeper understanding of social relationships on which societies and economies are structured and includes values such as reciprocity, responsibility, recognition, community, sense of belonging, redistribution, respect for humanity, shared values, social harmony, interconnectedness and unity (Munyaka & Mothlabi 2009; Ramose 2003).

Questions on the meaning and utility of concepts in African thought such as *Ubuntu* have extended to research disciplines such as Social Work and Psychology. Concerns have been raised about the ethnocentric (particularly Euro-centric) nature of existing paradigms that form the basis of social work theory and practice within African contexts which developed from its colonial past (Casimir & Samuel 2015; Smith 2014). Instead of "internationalising" and "standardising" development and social work practices, Ibrahima and Mattaina (2019) argue that dominant models of practice and research in development and social work should be challenged and values, methods and interventions from within African experiences must be integrated into social work research and practice. Casimir and Samuel (2015) challenge this even further by contending for an alternative paradigm grounded within the cultural and

historical realities of African communal experiences which are based on epistemologies and worldviews different from current dominant development models. This suggests that development practice within African contexts will be better suited within the values and experiences within those particular societies.

As stated at the beginning of this section, the above thinking on understanding the significance of relationships in development has never been fully integrated into mainstream or critical theories of development, and, as a result, neglected relational approaches in their analysis of (under)development. Development theories from the 1970s onwards increasingly started placing more emphasis on relational dynamics to understand and address development challenges but have also fallen into the trap of recycling the development impasse without clear outcomes on the way forward. This will be discussed in the following sub-section.

2.3.1.4 Development theories from the 1970s onwards

In the 1970s, the mainstream notion of "backward" economies was challenged not only by dependency theory's emphasis on exploitation but also by representatives of the idea of "another development". The emphasis on another development was a response to the problems produced by modern growth-orientated development – primarily environmental destruction, cultural standardisation, exclusion of certain groups' viewpoints and interests and the lack of local popular participation (Abrahamsson 2003; Hettne 1995, 2008; Nederveen Pieterse 2001; Knutsson 2009).

"Another development" constitutes a coherent alternative development paradigm, in opposition to the modernisation paradigm because of the principle of territorialism as a counter to functionalism; the principle of cultural pluralism as a counter to standardised modernisation; and the principle of ecological sustainability as a counter to "growth" and consumerism (Hettne 1995). The Dag Hammarskjöld report *What now: Another Development* and an elaborated volume, *Another Development: Approaches and Strategies*, set out to redefine development to focus on needs-orientated, endogenous, self-reliant, ecologically sound, and structure-based transformation (Nerfin 1977). The Basic Needs Approach (BNA) was a reaction during the 1970s against the inability of conventional economic growth to eliminate poverty and inequality in search for more effective and direct ways of addressing poverty. The BNA was adopted by various UN agencies and the World Bank to complement conventional growth

models with social indicators. The 1970s were significant in challenging mainstream economic models and widening the potential repertoire of development (Knutsson 2009).

Despite emerging alternatives, the 1980s seemed a complex puzzle for development theories. The confusion was not in development studies per se, but in development practice, which was guided by ideological leanings. In *Marxism and Development Sociology: Interpreting the Impasse*, David Booth (1985) questioned the meta-theories that had dominated the development discourse for four decades and called for a return to empirical studies which, he argued, should guide theory and not vice versa. Booth argued that neo-Marxist and modernisation theories made serious meta-theoretical errors because these traditions were based on mistaken assumptions and methodologies and were out of touch with reality. He believed that these theories were unable to generate theoretically informed research on fundamental issues, especially in developing countries. Booth argued that empirical work was under-researched, untheorised and lacked cumulative quality. He was especially critical of "left-wing" lack of progress due to the inadequacy of accessible intellectual tools. Booth called for more rigorous approaches by first explaining the underlying assumptions and problems with meta-theories. Others joined the debate. Smith (1985) called the impasse a state of crisis, while Scott (1995) referred to it as a stalemate between modernising and dependency frameworks. Gernadze (2006) looked at numerous reports and studies and concluded that development has come to an impasse or a dead end.

The notion of a theoretical and practical cul-de-sac had a significant impact on the development debate. Yet, in the 1980s, classical economic theory and neoliberal ideology of markets forged forward through ideas and policies as prescribed by the Washington Consensus. The mainstream thinking of the 1980s shared the classical notions of earlier modernisation theories and promoted integration into the world market and macro-economic balance as the best ways to achieve economic growth. Mainstream theories during the 1980s moved from Keynesian influence and were more sceptical of state interventions and traditional development assistance, instead focusing on free-market solutions, international trade and foreign direct investment. Arguments included that "underdeveloped" countries lacked capital, states were inefficient, corrupt and rent-seeking, and inequality and poverty resulted due to state inefficiency and interference in "developing" countries (Andreasson 2010).

Mainstream theories pushed for governments to implement market-orientated policies as prescribed by powerful international financial institutions with policy reform conditions attached to loans offered to these countries, through the Structural Adjustment Programme (SAP) (Abrahamsson 2003; Hettne 1995; Nederveen Pieterse 2001). Many academics, policy researchers and activists are critical about structural adjustment programmes, raising questions about the suitability of multi-party politics and democracy in different contexts, and how to carry out political and economic reform simultaneously (Bakane-Tuoane 1995; Nyong'o 1995; Oyejide 1995; Olukoshi 1995).

The global neoliberal shift has been criticised widely by critical scholars and political activists. Many scholars have argued that the policy reforms based on market liberalisation and neoliberal theory and the conditions placed on developing countries have aggravated poverty and maldevelopment due to severe cutbacks on education, healthcare and other social costs (Abrahamsson 2003; Knutsson 2009). Despite the neoliberal push to increase the liberalisation of markets and limit state intervention, income inequality continued to increase. At the same time, the greater strides in economic growth and addressing poverty through state interventions in East Asia brought into question the legitimacy of neoliberal policies in addressing underdevelopment (Broad 2004; Moyo 2009; Stiglitz 2003; Soros 2011). The Washington Consensus was further criticised, like its predecessors, for its generalised approach and ahistorical measurement of performance (Gore 2000).

On later reflection, Dutch anthropologist and development studies expert Frans Schuurman (2000), linked the impasse of development in the 1980s and the failure of neoliberal policies to the following: 1. The empirical failure of "development" to alleviate poverty in large parts of the so-called developing world and widening the gap between rich and poor countries. 2. Enforced globalisation narrowed the role of the state as an agent of development and could no longer be considered the self-evident level of analysis in development processes. 3. Belief in human omnipotence and infinite progress from a Western perspective, where the developing world is a homogenous entity that needs to develop like the Western world.

During the 1990s, the critique of top-down modernisation grew and increasingly started addressing relational aspects of development (Hickey and Mohan 2004). More researchers advocated for the idea that "local" people participate and contribute to development to increase self-determination and empowerment. Community-led development was promoted as the

articulation of new or hidden worldviews, while localised civil society or social capital and social change were promoted (Ferguson 1996; Putnam 1993, 2001). Authors such as Giddens (1998), Booth (1996) and Schuurman (1996) supported more comparative methodologies and bringing agents back into the participation of development projects to emerge from the development impasse. Development participatory approaches were promoted as less extractive than non-participative strategies (Reason and Rowan 1981; Chambers 1995).

The critical theory tradition contributed to understanding development through the dynamics of discourse and power. For example, in *The will to know: history of sexuality*, Foucault (1976) unveils the mechanisms by which order of discourse produces permissible modes of being and thinking while disqualifying others. Within poststructuralism and post-development theories, theorists such as Escobar (1995), Ferguson (1996) and Sachs (1992) argued that international development was a tool used to control poor countries and maintain domination, and advocated for the deconstruction of development. State-centred approaches to development and the neoliberal focus on the market were challenged, stressing the need for alternatives and approaches that are people-centred. Post-development theories searched for "alternatives to development rather than alternative development" (Escobar 1995: 6).

There have been significant shifts in the meaning and understanding of development. However, it appears that the significance of relationships as a way to understand and measure development between individuals and groups has not been realised or taken seriously in development studies. The persistence of a development impasse highlights the gaps in theory and practice to solve development issues. The following sections will explain how the development impasse is recycled and the role of various actors in development.

2.3.2 Development problematic and the recycling of the development impasse

Despite many different schools of thought and theories of development, the development impasse persists. Dominant theoretical postulations forged forward, contesting for influence despite being heavily questioned since the 1980s, while the resistance and contestation against mainstream development and the desire to break from it continued (Power 2003). Hettne (1982) holds that there is a dialectic tension between the mainstream or hegemonic view of development and the counterview of development, which fundamentally questions the predominating values and societal aims of mainstream development. Those who are critical

and countering mainstream development are regarded as those who feel marginalised or have other reasons to oppose the current system. Development is not socially neutral, and the way it is conceived will be influenced by the tension between the mainstream and countering development views. Hettne further argues that the mainstream frequently "co-opts" the counterpositions by incorporating certain aspects of countering ideas, unless they are incompatible or regarded as too radical or utopian, which means the countering ideas will then remain as competing paradigms or perspectives (Knutsson 2009).

Questions continue to emerge as to whether and how alternative development remains distinguishable from mainstream development even though there is an alternative development "profile" or "package". Dutch scholar Nederveen Pieterse, whose work centres on global political economy, development studies and cultural studies, finds the idea of an alternative paradigm problematic:

> "First because whether paradigms apply to social science is questionable, second because in development the concern is with policy frameworks rather than explanatory frameworks, third because there are different views on whether a paradigm break with conventional development is desirable, and fourth because the actual divergence in approaches to development is narrowing" (Nederveen Pieterse 1996: 1).

In his later work, Nederveen Pieterse (2001) remarks that due to several decades of development failures, there has been extensive self-criticism in development circles, which has led to the acceleration of mainstream co-option of countering ideas. The notion of "Mainstream Alternative Development" (MAD) is becoming increasingly acceptable. Potter (2002) regards the changes in development theory as the evolution of ideas rather than a revolution, where ideas are accumulated instead of overthrown. Knutsson (2009) sees this as an enrichment in development thinking, since the concept evolves and broadens, widening its "potential repertoire" while countering positions can also offer an autonomous competing perspective.

The above debates on mainstream development and co-opting of counterdevelopment point to the strength of mainstream development to reinvent itself (Kaletsky 2010). Mainstream dominance and the influence of neoliberalist postmodernism have been articulated most notably in Francis Fukuyama's (1989) proclaimed "end of history", arguing that liberal capitalism and liberal democracy is unquestionably the most capable of advancing the lifestyles

of the majority. However, Fukuyama's claims and liberal democracy's popular image of openness, choice and vigorous change disguises a fundamental "inability to change" or transcend the current economic impasse (Winlow and Hall 2013). Mainstream development theories continue to reposition themselves as the champion of social justice and as the answer to development and poverty through fairness, equality, justice and freedom. These ideas have become part of the neoliberal discourse and the actuality of capitalism's economic logic is recentralised in academic discourse rather than regarded as an ethical or organisational problem (Winlow and Hall 2013).

The above dynamics between orthodox and alternative development have led to a deepening analysis of development (Cowen & Shenton 1996). The work of Gillian Hart (2006; 2010), who has worked extensively on political economy, social theory and critical human geography in Southern Africa and Southeast Asia, is prominent. Hart (2006) has challenged the claims made in the 1990s by both the "neoliberal right" and the "cultural left" that the idea of development was dead (to be replaced respectively either by free-market forces or by alternatives brought about by new social movements). She counters by suggesting that development remains a powerful field of ideas and practices characterised by "multi-layered struggles".

The distinction in development between "big D" development and "little d" development (Hart 2006) is notable. In Hart's (2006) explanation, "Big D" refers to specific and intentional interventions by "Western" post-World War modernisation in the global south to achieve improvement or progress. The "little d" refers to the creation of winners and losers within unfolding capitalist change in the struggle for power and resources. The "little d" is part of broad processes of change in geographically uneven and contradictory historical processes of creation and destruction. Hart (2006) argues that there are limits to understanding *D*evelopment in terms of power and knowledge as defined by Wolfgang Sachs and Arturo Escobar. Instead, the exercise of power should be understood "in multiple, interconnected arenas, inseparably linked with the socially and spatially uneven dynamics of capitalist development" (Hart 2006: 4). Hart distinguishes between "big D" and "little d" development but also understands them as dialectically interconnected, since "official discourses and practices of Development have re-emerged in old and new guises in the era of neoliberal capitalism precisely in order to mediate its destructive fallout" (Hart 2006: 2).

Hart's distinction has been productive because it has enabled a more fully historicised analysis of contemporary neoliberal capitalism and global power, and has potentially offered insight into how dominant discourses could be challenged and alternative development paths constructed. Hart's "D/d" distinction has been taken up in various ways in development studies. It has helped provide a simple framing device for introductory teaching in development, informed debates about theory and practice in development, and it has been used to challenge managerial and technical approaches to development that pay insufficient attention to politics, context and history (Lewis 2019). Further inquiry into the relationship between the "D/d" development and the interconnectedness of the two "types" of development limits the risk of a dualistic perspective and opens up the opportunity for much deeper analysis and understanding of the relationship between "D/d" development (Lewis 2019).

The deepening analysis of development, as explained above, is essential when considering debates on breaking from the development impasse. Much of the debates on devising a development agenda since the impasse and emerging from the impasse to address underdevelopment in developing countries have often centred around state, market and civil society and how they relate (Hettne 1995). The section below will explain the extent to which debates within development theory continue to circle around this configuration.

2.3.3 Debates on breaking the development impasse: states, markets and civil society

The state-market-civil society discourse includes discussions on activities performed either by the state or those performed outside of the state. Abrahamson (2003) uses Gramscian theory to explain the relations between different actors within society. He argues that since the end of World War II, the state, market and civil society have been competing for position and influence. According to this perspective, states are concerned with security, markets want an environment conducive to business, and "civil society's" concern is welfare. Actors have different concerns and interests, and their positions are "fought" within the superstructure of knowledge, meanings and values as the object of struggle,

> "The outcome of this war of position is a political configuration which generates a development discourse, which in turn influences practical strategies and policies. The discourse is determined by the power relations between the main actors: state, market

> and civil society. The actor with the upper hand is most likely to have the largest influence on the discourse" (Knutsson 2009: 4).

On a global level, Pax Britannica and Pax Americana have been dominant, and the power structures have greatly influenced the development discourse (Abrahamsson 2003). Mainstream development discourse, as influenced mainly by the growth and industrialisation narrative, has emphasised a state-market configuration, which is why many of the debates within development theory continue to circle around this configuration. It has been framed mainly around security policy and the logics of capitalism (Hettne 1995). Countering development mainstream theories often stem from "civil society", but these often get co-opted into the mainstream very quickly and then the dominant mainstream theories operationalise them within the same framework (Hettne 1995, 2008).

Debates on the role of "civil society" in development forms part of the mainstream-counterpoint dialectics of theories on development. Local Economic Development (LED) is an example as a relatively new discourse in development studies that focuses on "local development" through a participatory process of local people to ensure inclusivity in decision-making and sustainability of communities (United Nations 2009). It is regarded as an integrated approach to development rather than a "one size fits all", and consists of participatory initiatives to build on local capacity, where participants have ownership that is more compatible with long-term development plans. There are many definitions for LED in the literature (Blakely 1994; Scheepers and Monchusi 2002; ILO 2006; Trousdale 2005; Bartik 2003; Meyer-Stamer 2003, 2008; Swinburn et al. 2006), but in essence LED is "the total of all economic activities by all relevant stakeholders within a specific defined geographical region, working together in partnership to create economic development and ultimately improvement of quality of life for all residents in the area" (Meyer 2014: 625).

LED's shift to local participation results in limiting direct state involvement in development (Helmsing 2001). LED is a much more relevant and people-centred development approach to resolve the development impasse, but it is still partly rooted within the neoliberal economics of independent economic action, which seems to be co-optive rather than an alternative solution (Nell & Binns 1999). LED discourse was later displaced as either pro-poor or pro-market but does not provide a sustainable option, therefore, it reverts to state versus market debates (Bond 2002).

Since this thesis is interested in the position of civil society in a relational approach to development, it is relevant to unpack the term civil society in some detail. The concept "civil society" has been widely contested in the political space, but it has been an enduring concept in the development discourse (McIlwaine 1998). Civil society is often seen as separate and distinguished from the state and within the non-state sphere. Most commentators broadly refer to civil society as the space of social interaction between individuals and the state and social interactions by a range of organisations beyond the control of the state, including a range of formal and informal non-state organisations. Organisations generally included are community groups, voluntary groups, trade unions, cooperatives, business, media, labour unions, indigenous groups, charitable organisations, faith-based organisations, professional associations, and foundations, and a range of non-governmental organisations (NGOs) (The World Bank 2013).

Those who are in favour of using the concept "civil society" often argue that it is a normative ideal and "pivot of contemporary political philosophy" (Fine & Rai 1997: 7). The state exercises their powers over society, whereas civil society is the sphere where citizens either accept or reject the government's decisions. Furthermore, it is viewed as "the arena outside family, government, and market where people voluntarily associate to advance common interests" (Anheier 2008: 30). The term "civil society" has been used positively by placing it on the side of "agency, creativity, activity, productivity, freedom, association, life itself" while the state and its agencies are on the opposite spectrum where there is an absence of the above (Fine & Rai 1997). Civil society has the status of having a certain level of autonomy, with public aims, and is regarded as responsive and accountable through citizen mobilisation and participation. The notion of civil society emerged strongly as a distinct and alternative form of power as power from "below" versus power from "above" (Malena 2008).

The term has often been regarded in the mainstream literature as neutral and a "harmonious" arena of associational life with its own intrinsic value (Fowler 2013), but Howell and Pearce (2001) argue that civil society theory has essentially romanticised civil society. The neoliberal conception of civil society has used a neutral stance to frame a narrative of civil society as a positive force in development theory and practice, positively associating it with freedom and inclusivity (Fine & Rai 1997). Sceptics often denounce the concept "civil society" as vague, expressing many different ideas, empirically broad, ideologically stretched and not a useful

tool of theory for empirical research. Howell and Pearce (2001) disagree with sceptics who entirely reject the concept but are concerned that current donor discourse on development and practice is in danger of "reifying civil society as a natural and historically inevitable component of the capitalist economy" (Howell and Pearce 2001: 2). Fowler (2013) uses Wallerstein's idea of hegemony and contends that the counter-hegemonic function of civil society is excluded because of the propagation of Western universalism for all societies – through aid, trade and other means – is itself a hegemonic project.

Increasingly, sceptics have called for a move beyond arguments on the concept civil society based on ideological grounds, but also the need to account for geographical diversity (McIlwaine 1998). Contesting the term civil society is to guard against the glorification of what civil society can do, while also incorporating the recognition of geographical diversity and differentiation within the debates (Anheier 2008). Ugandan author Mahmood Mamdani (1996), who specialises in African colonial and postcolonialism, maintains that the conception of civil society is too unclear and the context, history and development of different (civil) societies too important to analyse African and European civil societies through the same lenses.

However, the goal of fostering civil society remains an important aspiration for many nations as an idea which gives various civic groups access to decision-making processes. It also remains a valuable "relational space" to improve the interactions with others in and between societies. In the idea of civil society, relationships are essential as both holding society together and ensuring that it functions well. However, the breakdown in relationships cannot merely be rescued by bridging the gap and trying to be more inclusive economically. It requires much more in-depth understandings of the importance of relationship as the fundamental building blocks to well-being between individuals, groups, organisations and societies.

So far, this chapter has reviewed some of the central theoretical tenets in development and has shown how the development impasse persists despite different actors' involvement in development. Throughout the review, some references have been made to how some of the development theories view poverty and inequality. Poverty and inequality are critical issues in development, which is why the following section will provide a more detailed account of the different perspectives on the causes of poverty and inequality as they relate to development. Understanding the different causes highlights the importance of relationships in approaches to

development and the need for new perspectives, interpretative categories and predictive models to measure, understand and analyse relationships within the development context.

2.4 Causes of poverty and inequality – traces of relational perspectives

An overview of key perspectives on the causes of poverty and inequality in development studies sheds light on the traces of relational perspectives that can be seen in development studies and debates. What has come out strongly in debates on approaches to development is the shift in literature on poverty and inequality from linear to multifaceted and multidimensional approaches. In the last fifty years or so, the notion of development has changed from simplistic understandings to much more dynamic ideas, understandings and approaches to development and addressing poverty and inequality within societies (Hettne, 1995; Nederveen Pieterse 2001; Schuurman 2000; Simon 1999; Thorbecke 2006). These shifts and changes have also shaped and increased the agents of development and the levels of development analysis (Knustsson 2009). Even though it appears that countering paradigms to mainstream theories of development are mostly operationalised within a neoliberal institutional setting, there are some preliminary "shadows" of relational perspectives.

Conceptualisations of poverty and inequality are paramount to the study of development. Although inequality and poverty are both critical issues, these issues should not be conflated, since these are analytically distinct concepts (Beteille 2003). Nevertheless, understanding and measuring have both been important in development studies. Poverty has always been central to development studies with a focus on growth and income (dollar ratio measurement of poverty), and inequality has often been understood mainly as the differences between different income groups (through measures such as Gini Coefficient). Through this lens, poverty and inequality have been defined and measured according to people's material or physical realities. The economic markers with which to understand and measure poverty and inequality are important, but they are also complex and contested within the literature on development.

The focus is shifting away from income to finding other ways of determining "progress" in society (Boulanger 2008; New Economics Foundation 2017; Stiglitz, Sen & Fitoussi 2009; UNDP 2010; United Nations 2015). More integrated and holistic understandings of the economy, society and issues such as poverty and inequality have developed in the last three decades (Piketty 2014; Eisenstein 2014; Therborn 2006, 2013; Fredman 2007; Fraser 1996).

People experience material, psychological and social inequalities that are shaped by discursive orders (how the states in which people find themselves are described, identified, named and classified). There are many factors that are not just material, and even if people share common spaces, there are significant differences in power and possibilities (access, providence, self-worth, mental well-being). When poverty and inequality are considered in their complexity, questions emerge about the nature of poverty and inequality, what has led to these (casual and constitutive elements) and why they are durable social phenomena (Soudien, Reddy & Woolard 2018). Understanding poverty and inequality takes us beyond the dominance of economic approaches (such as the material and access to opportunity). It includes socio-psychological states and experiences that require different understandings of these concepts as well as different measurements than income and differentials in income (Soudien, Reddy & Woolard 2018).

There are various perspectives on the causes of poverty, including psychological perspectives, sociological perspectives, philosophical reviews and economic theories of poverty. Psychological perspectives on poverty focus on social processes, mental health, genetic and environmental factors, and neurological and cognition effects. However, poverty is fundamentally a socio-economic issue, which means psychological theory can merely provide a complementary approach and supplement social and economic strategies to understand and address poverty (Fell & Hewstone 2015). Sociological and philosophical perspectives will be explained as part of economic perspectives, since these issues are interrelated and interdependent.

The extent to which development theories emphasise and evaluate the importance of relationships and the "kinds" of relationships they focus on differ. While classical and neo-classical theories focus on poverty as a consequence of individual actions (Stark 2009), structuralist theories focus on the functions of government and other institutions to address poverty and unemployment (Davis and Sanchez-Martinez 2015). Radical perspectives within the Marxist and Neo-Marxist traditions shift from an individual focus to relationships between different groups, since they argue that the status and power of an individual is dependent on the environment (Harvey & Reed 1992; Lewis 1968). The following sections will consider the differing perspectives on poverty and inequality in more detail, starting with a historical account, through the perspectives of thinkers from the 1700s through to current debates.

2.4.1 Classical and neoclassical perspectives on poverty

If we travel back in history, we will see that classical traditions within liberal laissez-faire[1] focus mainly on poverty as a consequence of individual action. The role of the state is limited to changing individual capabilities and attitudes. Immanuel Kant, operating from within the classical tradition, grounded morality in reason and believed that every person has the moral duty to help the poor in the hope that others will do the same (Stark 2009). Helping those in need emphasises that the moral duty to the poor is an obligation of one individual to the other rather than the obligation of the state to an individual, and the obligation is voluntary. This moral conception distinguishes between the deserving and undeserving poor, which is a distinction between the poor who are hardworking and self-sacrificing but "unlucky" or unable to work through no fault of their own (but due to macro or structural forces) and those who are lazy, dishonest, wilfully ignorant and left to the consequences of their own bad choices (Ross 1991).

Similarly, demographer and theologian Robert Malthus (1798), influenced by Adam Smith, argued that poverty is based on the productive structures of society, which are attributed to cultural practices and beliefs. Malthus believed that victims of poverty are responsible for poverty, although the rational poor (like the undeserving poor) faced unavoidable accidents or situations while the perverse poor simply rejected moral education. Malthus recommended moral education to the perverse poor as a way out of ignorance and moral deprivation. Classical economists such as Adam Smith, David Ricardo, Robert Malthus and John Stuart Mill base the diagnosis and solutions to societal problems on the "individual" and individualism (Kemal Utku 2012).

[1] Central to liberal laissez-faire is the idea of the autonomy of the individual. This refers to the idea that autonomous people are rationally self-willed and can determine their own lives because of their independence from external authority. The emphasis is on the importance of the individual and individual freedom. Politically, this usually implies that the state and government are limited from interfering in the private sphere of people (Heywood 2007b).

Other perceptions in classical thinking of poverty include poverty as injustice and poverty as utility. The former focuses on injustices caused by law and politics, which should be addressed by certain rights to citizens, including the poor. Jean-Jacques Rousseau (1754) promoted the idea of poverty as justice, promoting the perspective that the poor are "rights-bearers" with the power to uphold their political and economic rights. The latter is based on Jeremy Bentham's principle of utility – that humans are governed by a simple calculus of maximising pleasure and minimising pain. The cause of poverty is seen as the failure of organising legal and economic institutions in a sensible way that promotes the collective well-being, since an individual's happiness depends on the aggregate happiness of the group (Stark 2009).

The neoclassical school developed in the 1870s and continued the classical premise of individual responsibilities as the point of departure and stressed the role of unequal endowment of talents, skills, capital and the productivity of individuals, which could generate poverty. Neoclassical traditions still fall within the premise of individual responsibilities but also recognise reasons for poverty beyond individual control. It includes the impact of market failures on the poor, education and skills, health, age and barriers to employment. Other factors, such as market failures, uncertainties and shocks on the poor and vulnerable may be further setbacks for the poor. The focus for the neoclassical school is the marginal productivity of the labourer and the social consequences of this marginality, which emphasises the impact of poor productivity. The focus is less on understanding the reasons for the marginal productivity, but rather on equipping the poor with the skills, socialising behaviours and reorientating their values and actions, which provides them with the incentives to make choices to help them out of poverty. It is, therefore, the poor that must be transformed (Harvey & Reed 1992). The wealthy are the benchmark and interventions should provide the poor with the incentives to reach the benchmark. Welfare programmes are not encouraged, since neoclassical thinkers believe that interventions distort market processes and efficiency. The focus is not on transforming the production system but on transforming the poor.

Classical and neo-classical philosophies share an entrenched commitment to individual freedom and autonomy. Poverty is viewed as a failure of personal virtue, deserved by those who lack the will and ambition to work, gain income and climb the social ladder (Phelps 2006).

A further jump to the early 1900s leads to structuralist theories, which can also be situated within the classical tradition, but with a stronger focus on the functions of government and

other institutions to address poverty and unemployment. Individual action can still be responsible for poverty, but government interventions act as a facilitator to ensure that there is more equal income distribution to enable disadvantaged groups to participate. Unemployment is regarded as a significant cause of poverty, together with excessive inflation, high sovereign debt and asset bubbles, which is why government intervention includes support for physical and human capital and providing public goods (Davis and Sanchez-Martinez 2015).

Within the Anglo-Saxon structuralist tradition, the focus is on the internal barriers to development and the importance of government intervention to help increase the productivity of national economies. But as explained earlier in section 2.2.1.2, the structuralist Latin America school of the mid-twentieth century emphasised the exploitative relationships between nation-states that leads to underdevelopment for certain states. Emphasis is not placed only on underdevelopment and poverty but also on how dependency between different states create, perpetuate and increase inequality. As mentioned in section 2.2.1.2, Paul Prebisch and Andre Frank's theory on underdevelopment argues that advanced economies remain in a better position than developing countries due to the relationships that have created the conditions for unemployment and underdevelopment (Davis and Sanchez-Martinez 2015).

In trying to understand poverty and inequality, structuralist theory focuses mainly on the relationships between the so-called developed and developing countries. Although unbalanced relationships between states form part of the analysis of structural theories, this theory remains generalised and oversimplified, and continues to fall under economic debates on poverty and inequality.

The above theories and traditions on the causes of poverty and inequality have been challenged by "radicals" in mainly Marxist and neo-Marxist traditions on development.

2.4.2 Radicals and discontents

Disciplines or fields such as sociology and anthropology have played a crucial role in development studies and in critiquing classical and neo-classical perspectives on the causes of poverty. Theories that counter the liberal focus on the individual have focused on group and cultural reasons for poverty and inequality.

Early proponents of critical development theories originated from Marxian schools during the 19th century through the works of Karl Marx (1887) and Friedrich Engels, who point to capitalism as the leading cause of poverty. They argue that the capitalist system leads to inequality and uneven distribution of wealth and income. One of the challenges is the relationship between different classes. Only a few reap the benefits of the capitalist system, while the poor are exploited to the benefit of an elite. The system is, therefore, based on exploitative relationships (Heywood 2007a). Classical Marxism's understanding of poverty stems from the nature of modes of production or the nature of capitalism, including class conflicts, labour, productivity and industrialisation. Poverty is a by-product of modernisation and the production process, which leads people into work where they are isolated and impoverished (Heywood 2007a). The accumulation of wealth is valued, and, as a result, people become "commodities" while institutions are used as instruments by the ruling elite. In the Marxist analysis of the causes of poverty, poverty is both a moral and technical issue. Poverty and inequality are functional components of the capitalist mode of production – capitalism produces unequal social structures (Davis and Sanchez-Martinez 2015).

Neo-Marxism encompasses 20th-century approaches that amended Marxist theory and expanded the reasons for poverty and social inequality to issues of status and power (Foster-Carter 1973). Unequal social structures persist from one generation to the next as hierarchical structures. Unequal structures are perpetuated in the form of racial and gender discrimination and nepotism, since certain groups are deprived of opportunities such as jobs, education or social assistance due to the economic and social marginalisation of an entire group of people. Such groups end up poorer due to the lack of access to opportunities (Harvey & Reed 1992; Lewis 1968). The socialisation of marginalised and poor people leads to behavioural traits to cope with the material deficiency experienced by the groupings, which collectively change the world view of the poor and lead to pervasive hopelessness, despair and a state of poverty. An "underclass" results as permanent and locked into its own maladaptive culture as children are born, raised and socialised in homes, geographical areas or communities that limit and obstruct their access to successful participation in mainstream institutions (Marks 1991). Lewis (1968) refers to the emerging behavioural traits and norms as a culture of poverty.

Many neo-Marxists also view economic and political systems as a major reason for the increase in inequality. Some neo-Marxist theorists argue that the neoliberal focus on growth is problematic due to its limited and narrow view on inequality as centring around income (Hart

2013). Inequality is not simply about wealth or lack of wealth, and the growth ideology and "trickle-down" effect have failed to bring about meaningful change in society. In the 21st century, economist Thomas Piketty (2014) has brought renewed focus on the debate on inequality and the dangers of a capitalist system left unchecked, leading to worsening levels of inequality. Piketty builds on the earlier work of Wilkinson and Pickett (2009), who assert in *The Spirit Level* that income inequality in prosperous economies is related to other social and health problems. Their statistics show the correlation between income inequality and other problems, which provides a strong argument for pursuing higher levels of equality within societies. Similarly, philosopher Adam Swift (2009) argues that inequality is not necessarily the problem, but that high levels of inequality have negative implications for, for example, people's self-respect, health and social cohesion within societies.

The analysis of economic inequality as explained in Piketty's *Capital in the Twenty-First Century* (2014) has been challenged by scholars of critical race theory and gender. Zillah Eisenstein (2014) criticises Piketty's narrow analysis of income inequality and argues that inequality is much more complex. Eisenstein (2014) believes that race and gender should be included in the formulation of class inequality as an analytical framework, since capital intersects with the bodies that produce the labour.

The idea that race and gender might intersect to affect inequality is captured by the concept of "intersectionality", which was coined by Kimberlé Crenshawe in 1989. Crenshawe, a black American scholar, coined this term to argue that the experience of all women is not universal, but that the experience of black women is different from that of white women. Intersectionality helps to avoid reducing the complexity of power constructions into a single social division. Social divisions, which construct power relations, are not simply viewed as additive, cross-cutting or interlocking but as mutually constituted although ontologically irreducible to each other. Viewing intersectionality in this way helps to form "particular nuanced and contested meanings of particular social locations in particular historical moments, within particular social, economic and political contexts in which some social divisions have more saliency and effect" (Yuval-Davis 2015: 90).

The importance of viewing inequality and power relations as "mutually constituted" and interconnected highlights the importance of understanding the dynamics of relationships. Relational inequality is produced on state, market, and "civil society" levels, as well as in

intergenerational, familial and interpersonal networks, and should be understood both in macro global structures and micro social encounters (Brandon 2012; Schluter 2012). Viewing the different understandings of poverty and inequality more relationally provides a framework from which to further explore if and how they are interlinked.

Social exclusion, for example, is closely related to power and powerlessness in the process of the marginalisation and deprivation of the poor (Morse and McNamara 2013). Social exclusion also has a significant impact on inequalities between individuals and groups within society. It focuses on the processes and dynamics that allow deprivation to arise and persist. Exclusion focuses on the structural characteristics of a society, the processes of marginalisation and how marginalised groups are able to access various resources and participate in society (Ludi and Bird 2007). Robert Chambers (1995: 173) provides challenging insights in his concern with power relations and the power asymmetries in all development processes when he asks "Whose reality counts? Who constructs that reality? Who acts upon that reality? Who is in control of the 'development' process?" These questions can also be considered as part of power dynamics within various groupings, since communities and households are not necessarily homogenous or harmonious units. Chambers (1995) shows not only the diverse, complex and dynamic local realities of the poor, but gives examples of how poor people's criteria differ from those assumed by professionals, including neglected dimensions of deprivation, vulnerability, seasonality, powerlessness and humiliation.

Arguments on social exclusion have also been taken further to highlight the risks of adverse inclusion (Du Toit & Hickey 2006). Social exclusion and adverse incorporation may operate simultaneously and with different effects. An individual may be excluded from receiving a service and, at the same time, be incorporated economically. Exclusion may influence the nature of incorporation and vice versa. Poor people may be included in social, political and economic systems but in a way that is detrimental, damaging or adverse to their well-being. Complex relationships with patrons may reinforce socially inferior positions and go beyond monetary and capability approaches (Ludi and Bird 2007). Accessing resources and capital are dependent on relationships, the structural characteristics of society and the interests promoted by the powerful.

The above arguments highlight the extent to which power asymmetries play a role in creating and perpetuating poverty and inequality. Poverty defined as absolute poverty, relative poverty

or even social exclusion does not go far enough to get to the root of the issue. In essence, poverty and inequality are about the personal, global, structural and institutional relationships that create and perpetuate poverty and inequality (Brandon 2012). Poverty and inequality are also linked to interpersonal, family, ethnic, gender or group relationships and its impact on people's socioeconomic realities, "well-being" and "life satisfaction (Cho, Impett and Campos 2020; Stock et al. 2014; Hanpää, Kuula and Hakovirta 2019).

Various debates have helped to deepen the way poverty and inequality are approached. Poverty has been presented as having various dimensions, namely depth, breadth and duration as variations of "extent" (Moore et al. 2008). The term "scarcity" has also been used rather than poverty, which is meant to relate the concept to different groups and classes and, therefore, allows for assessment of lack beyond economic needs (such as social, biological and psychological) (Mullainathan and Shafir 2013). Similarly, Amartya Sen's (2005) capability approach, which will be explained in more detail in the following chapter (section 3.5), focuses on how diminished capability undermines the potential of an individual to function effectively in an economic setting.

The above assessments of poverty illustrate the need to dispense with linear perspectives of poverty. This study relies on the above but goes a step further to suggest that capabilities and functionings should also be viewed as "*relational* capabilities and functionings". Part of analysing relationships is to understand holistic development not simply from individualistic or material perspectives, but also within social relational contexts.

2.5 Conclusion

This chapter considered some of the main theoretical arguments in development theories that have been significant in influencing the discourse on development in theory and practice. It includes modernisation and growth theories, which have been dominant in mainstream economics since the 1950s even as it has changed and developed within classical, neoclassical and neoliberal political-economic thinking. Theories critical of mainstream development (particularly dependency and structuralist theories) emerged soon after modernisation theories (during the 1950s) to counter the "one-size-fits-all" models of modernisation theories. The above critical development theories are prominent in development studies, but this chapter also pointed to challenges to mainstream development from African scholars (since the research is

located in an African and South African context). However, these challenges have not translated into a viable alternative development model or infiltrated the development debate sufficiently. Instead, alternative development perspectives from the 1970s have been "swallowed up" by the mainstream development discourse, bringing about reforms but not transforming the way we think about development. A development impasse persists between mainstream and counterperspectives to development and between state-market-civil society debates on development. Alternatives to mainstream development seem trapped and are often co-opted by mainstream theories, which makes it increasingly difficult to distinguish between mainstream and alternative paradigms of development.

Since Booth's seminal 1985 article on the impasse of development in theory and practice, there have been significant developments in the field of development studies in theory, research, methods and practice. Nevertheless, as argued by Graaff (2005: 2), "development theory has inherited from 'mainstream' theory, an equally insidious array of metatheoretical problems which have to do with relativism, agency, collusion." Perhaps the above analyses are indicative of the challenge for so-called alternative voices to move beyond the development impasse. The collaboration of thesis and antithesis does not necessarily reflect real development and has not translated into effective policy. Instead, the countertheories to the mainstream development are trapped within neoliberalism, and it seems nearly impossible for the convergence between mainstream and counterpoints of development to take place without the neoliberal tradition taking over the discourse. The convergence of different ideas also leads to attempts to solve development problems by using the same kind of thinking that created the problem. Consequently, ideas on development and development theory influence actual policy decisions and development action (Deneulin 2006). The recommendations continue with the tendency to view issues through linear and reductionist lenses.

A key argument made in this chapter is that the development impasse and redundant development arguments have implications for the study and understanding of poverty and inequality. The different development perspectives on the causes of poverty and inequality indicate the extent to which the role of relationships in development is valued. The classical and neo-classical theories place very little focus on relationships and primarily focus on individual reasons for poverty. The structuralist focus on relationships is limited to government and other institutions' role in addressing poverty. Neo-Marxists place much greater emphasis on relationships, with power and status as important considerations between different groups,

which also focuses more on inequality between groups. After considering the various debates on poverty and inequality, this chapter briefly highlighted the significance of exploring and understanding relationships between people to define development better. This approach will be explained in more detail in the following chapter.

What the above broad structure does is to point to the theoretical gaps that undermine development. The "holes" in development theory are uncomfortably glaring. However, the situation creates an important opportunity to think of new and innovative research methods that can contribute to development theory and to understanding and approaching development more effectively.

The following chapter will further explore Relational Thinking as a conceptual framework from which to critique development theory and practice, and as a practical tool to better understand the importance and dynamics of relationships in development on macro and micro levels of development.

CHAPTER 3: THE FAULT LINES OF DEVELOPMENT THEORY AND PRACTICE

3.1 Introduction

Chapters one and two detailed the problem of the failure of the global development enterprise to deliver conceptually and practically on development issues such as poverty and inequality. A key argument made in those chapters was that a development impasse persists due to redundant development arguments, which also has implications for poverty and inequality. What development theories to date have ignored is the social, or relational, element of development.

This chapter explores the relational element of development, specifically in the context of South Africa, in order to set the scene for the case study, which will be described in chapters five and six. It does this through the two methodological lenses used in this thesis, Relational Thinking and the human economy approach.

Relational Thinking recognises the theoretical importance of relationships between people, groups and societies and seeks new perspectives, interpretive categories and predictive models by measuring relationships through the Relational Proximity Framework (RPF). As mentioned in section 1.6 of chapter one, the Jubilee Centre and Relationships Foundation in Cambridge have developed the RPF, which can be applied at various levels, including private and public sectors worldwide, as a tool to understand, measure and influence relationships (Lee & Schluter 2009). The RPF will form an essential part of the research, since it provides measurements through which to assess the case study and is an important way in which to understand and interpret the case study of this thesis, namely the James 1:27 Trust, and their conceptualisation, ideas and practices. Section 3.3 of this chapter will introduce the relational drivers of the RPF, which include directness, continuity, multiplexity, parity and commonality, which will then be detailed further in the methodology chapter.

The human economy approach is an additional lens since it focuses on the study of economic alternatives through an interdisciplinary approach. It was first inspired by social and cultural anthropology to gain deeper empirical and pragmatic insights on what people do and how people interact in social and economic institutions.

This chapter will start with an analysis of the approaches by the government of South Africa to address issues such as poverty and inequality, as South Africa is situated in the global development enterprise. This analysis builds on the discussion of chapter two, which looked at causes of poverty and inequality in historical perspective, and will include a discussion of frameworks, policies and research related to development by the South African government. The idea of care work and a care economy in South Africa will also be explained in this section since it relates to broader discussions on the creation of a relational economy that underscores the importance of relationships. The discussion on a care economy is further elaborated upon in the thinking and language in the case study of this research.

Relational Thinking and the human economy approach, as understood from a relational perspective, will then be discussed in the following section. The chapter will then provide a critique on development language and meanings. Included in the discussion are so-called "buzzwords" that are shaped by development philosophies, which in turn shape development measurements and interventions. This chapter will provide an overview of development measurements used internationally and in South Africa (as an important context for this study). Arguably, these measures of development have converged around the human development paradigm, which is currently regarded as the most holistic development model to address poverty and inequality. The human development paradigm is, therefore, important in discussions on development, but this chapter will also provide a critique of the paradigm from a relational outlook on development.

This research uses Relational Thinking as an approach to suggest that the development discourse requires more relational ways of thinking about development, the language used in development, and what is valued as important to development. Chapter four will explain the research methodology, and then chapter five will build on the arguments made in this chapter through a critical analysis of the terms, concepts and language used in the James 1:27 Trust. First, this chapter will turn to an overview of development in South Africa.

3.2 An overview of development in South Africa – frameworks, policies and research

As discussed in chapters one and two, the inconsistencies in theories on development and the rhetoric of development are largely based on economic perspectives and focused on material results. Increasingly, studies have shown that economic growth does not necessarily translate

into poverty reduction, reduced inequality or employment (Fauzel, Seetanah & Sannassee 2015; Sharma and Gani 2004), and studies that examine the relationship between poverty and other variables of development are still reduced to the economy (Dollar & Kraay 2001; Gohou & Soumare 2012; Jeanneney & Kpodar 2008). Data on inequality shows a rise in inequality in rich economies as well as emerging and developing economies, while relative poverty is proving stubbornly resistant in developing countries (OECD 2019).

South Africa is no exception and a case in point of how the global development enterprise is failing to deliver development to South Africans. In the last sixteen years, South Africa has largely shifted between neoliberal and neo-Marxists economics, shifting focus between the role of the market and the state (as discussed in chapter two, section 2.3). Since 1994, the South African government has framed social reform policies from the premise that poverty and inequality are understood from a human rights perspective and that South Africa's development should be inclusive (Magasela 2006). The first initiative by the African National Congress (ANC) was a party document in 1992 titled *Ready to Govern*, which had a key focus on their social and economic policies and their approach outlined to fight poverty and combat inequality as policy interventions (Magasela 2006).

The second initiative was to gather information through the Project for Statistics on Living Standards and Development (PSLSD) by the World Bank and South Africa in 1993. The PSLSD aimed to provide information on the living conditions of all South Africans and was regarded as the benchmark for comprehensive poverty-related data in the country. Based on the PSLSD, the first official study on poverty post-1994 that was done in the country was called the Key Indicators of Poverty in South Africa, published in 1998 by the Ministry in the Office of the President: Reconstruction and Development (Magasela 2006).

The third initiative was the Reconstruction and Development Programme (RDP), the first development policy post-1994 and it focused on the role of the state. The key programmes of the RDP were to meet the basic needs of people, developing the country's human resources, building the economy, and democratising the state and society (Magasela 2006). The RDP aimed at integrating growth, development, reconstruction and reconciliation into a unified programme, even though the RDP White Paper referred mostly to growth, reconstruction and development (Adelzadeh & Padayachee 1994). The government's initial initiative to achieve more inclusive development through the RDP did not last very long.

In 1996, the second policy adopted by the government was Growth Employment and Redistribution (GEAR). GEAR supported neoliberal policies through macroeconomic strategies emphasising economic growth and its "trickle-down" effect. It echoed the substance of the Washington Consensus by focusing on generating growth through conservative fiscal and monetary policies, trade liberalisation, deregulation of markets, and privatisation of state-owned enterprises (Blumenfeld 2015). GEAR was criticised from within the tripartite alliance and civil society as a domestic version of the World Bank's Structural Adjustment Programme to promote and enable a macroeconomic environment for poverty eradication programmes, but economic growth took preference over other considerations (Everatt 2003). The RDP's focus was on social interventionist goals and about redistribution (and not development as it purported). However, GEAR was imposed as a market-driven strategy with the argument that redistribution cannot take place without growth. These are conflicting paradigms focused on poverty alleviation as people-centred and community-led (micro) on the one hand and, on the other, on engagement with global economic forces to enhance competitive advantage (market-orientated development) (Kamara 2017).

Three further plans by government have also been promulgated, all with the aim of addressing poverty and inequality mainly through increasing growth and employment opportunities. In 2005, the Accelerated and Shared Growth Initiative for South Africa (ASGISA) promised to increase the South African growth rate to 6% by 2010 and halve unemployment and poverty by 2014. ASGISA highlighted inequality, "resulting in many economically marginalised people being unable to contribute to and/or share in the benefits of growth and development (the Second Economy)", as one of the "six binding constraints of growth" that hampered the then government's targets to halve unemployment and poverty between 2004 and 2014. In 2010, the New Growth Path (NGP) aimed to create five million new "decent" jobs by 2020, therefore reducing the unemployment rate from 25% to 15% (Blumenfeld 2015). The NGP followed from the growing consensus that decent work, reducing inequality and eradicating poverty require a new growth path with the restructuring of the South African economy. The idea of a developmental state that emphasises the importance of leadership, planning and coordination from the state to promote the key objectives of job creation, a greener, fairer and more competitive economy as well as facilitating social dialogue in the country was promoted (Nattrass 2011; Turok 2011).

In 2012, former President Jacob Zuma established the National Planning Commission (NPC) (2012) to review and respond to the country's achievements and challenges. Based on the Commission's findings, the National Development Plan was developed. It stated that,

> "(T)o accelerate progress, deepen democracy and build a more inclusive society, South Africa must translate political emancipation into economic well-being for all… Realising such a society will require transformation of the economy and focused efforts to build the country's capabilities. To eliminate poverty and reduce inequality, the economy must grow faster and in ways that benefit all South Africans."

The NDP aims to eliminate income poverty by 2030 and reduce inequality through a Gini Coefficient reduction from 0.69 to 0.6. As part of the NDP's approach to change, the NDP report uses a cycle of development to demonstrate the close links between "capabilities, opportunities and employment on social and living conditions". It further "… shows how leadership, an active citizenry and effective government can help drive development in a socially cohesive environment" (National Planning Commission 2012).

The NDP garnered generally favourable formal support for its approach to development and its long-term vision of a sustainable development path, and has been regarded as more egalitarian, broad-based and more transformative and empowering than the RDP. However, critics of the NDP believe that it maintains the status quo with regard to fundamental issues such as redistribution, democratic participation and access to the wealth of the country. Moyo and Mamabolo (2014), for example, argue that the NDP is broader in scope than GEAR and ASGISA but are concerned about the limits of the NDP in providing the comprehensive and effective strategies required to transform South Africa's society. The NDP is premised on the expectation that positive changes will happen once growth occurs, which is an assumption not based on empirical evidence (Van Der Heever 2016).

There have also been various other initiatives by government to address poverty and inequality in the country. Since 1994, the office of the Deputy President commissioned reports on poverty and inequality as a commitment to eradicate poverty and reduce inequality. Reports include the 1995 Key Indicators of Poverty in South Africa, the Participative Poverty Assessment – South Africa report and the Poverty and Inequality Report (PIR), published in 1998 (Richmond 2007).

The PIR found that South Africa is characterised by significant levels of poverty. Many are at risk of falling into poverty and the distribution of income and wealth in South Africa is hugely unequal. It also concluded that many households do not have sufficient access to clean water, energy, health and education (May 2000). The PIR suggested a more holistic approach to poverty and inequality that captures the different dimensions of poverty (Magasela 2006). Another government initiative was the research conducted by the Taylor Committee of Inquiry into a Comprehensive System of Social Security for South Africa. They published *Transforming the Present – Protecting the Future* in 2002 and recommended a five-pronged social protection system to address widespread income poverty as well as the lack of access to assets, basic needs and widespread capabilities poverty (Richmond 2007).

In 1995, Nelson Mandela represented South Africa at the World Summit for Social Development held in Copenhagen, where he agreed to prioritise eradicating absolute forms of poverty and reducing other forms of poverty. It was suggested at the summit that countries develop a clear set of policies that will address poverty comprehensively, prioritising the poor and vulnerable (such as women and children) in participatory research projects and work with domestic, regional and international partners to develop and adopt official indicators to measure progress against poverty. Different measures to poverty and inequality have been developed by different researchers, government departments and agencies that reflect not only the lack of consensus – and at times confusion – of approaches to poverty and inequality (Oosthuizen 2008). The different conceptualisations and definitions also highlight the different dimensions of the manifestation of poverty and inequality. Magasela (2006) argues that the different measures by different departments forced government departments to develop more comprehensive and multidimensional applications of anti-poverty policies that reflect their constitutional mandate, corresponding to specific socio-economic rights instead of focusing only on absolute or minimalist income-based poverty lines.

The solutions often provided to socio-economic problems in economic terms seem “quick and simple”. They include options such as lowering interest rates to stimulate the economy, providing fiscal stimulus to allow new money into the economy and increasing growth, or raising the retirement age to generate more taxes and lower government expenditure. However, society is a complex and interconnected system; nothing exists in isolation. The messages we receive about these interconnected aspects can shape what we value and prioritise and when these problems are addressed, they create a range of side-effects. For example, interest rates

impact employment, but they also affect decisions on what households make, and policies that affect employment also impact on household structures, who works where, for how long and how much money they earn. Policies often operate on single-issue campaigns and are short-term and fragmentary instead of addressing social and economic challenges in a lasting, meaningful and integrated ways (Brandon 2012).

Despite all the frameworks, policies, programmes and efforts, South Africa's poverty, unemployment and inequality (based on income) remain ominously high two decades after political liberation. In 1994, the official unemployment rate stood at 20%, and by 2019, had increased to 29.1% (StatsSA 2018). The distribution of income is now more unequal (Seekings 2014); in fact, according to StatsSA (2019), inequality has increased since 1994 and is currently at 0.63. The material conditions of the poor have hardly changed, regardless of the transformation rhetoric that has guided South Africa's economic trajectory. The Poverty Trends in South Africa report (StatsSA 2017) shows that more than half of South Africans were poor in 2015, with the poverty headcount increasing to 55,5% from a series low of 53,2% in 2011. The South African economy has seen the financial health of South African households decline under the weight of economic pressures and, in turn, this has dragged more households and individuals down into poverty. Paradoxically, Gross Domestic Product (GDP) has expanded at 3% between 1994 and 2008. During the early 2000s, when South Africa experienced some of its highest levels of growth, at times above 6%, unemployment levels dropped by only about 3% – from their highest in 1999 at 25.4% to 22.6% in 2006. Two decades into democracy, South Africa seems trapped.

Debates continue to revolve around options of growth or redistribution, pro-poor or jobless growth, and between a welfare state or state capitalism. The figures above are staggering considering that income poverty and inequality are closely related to unemployment, poor health, reduced access to education and physical environments that compromise personal safety (Hall, Richter, Mokomane and Lake 2018). South Africa's structural inequalities are still intact and systemic challenges within society persist, while the focus on growth and income inequality fails to consider the complexity of poverty and inequality and the much deeper levels at which it must be addressed (Wilson and Cornell 2012). Megatrends suggest that there are increasing pressures on employment and social protection as a result of globalisation, technology, jobless growth, poor quality employment and climate change as well as care deficits in care service provision for young, sick, disabled and older people (ILO 2018b).

The above policy frameworks and statistics form part of much larger debates in the development field and in development research, both globally and in South Africa, which have attempted to address challenges such as poverty and inequality through more "holistic" development approaches and measurements. In 2017, the South African government signed an agreement to develop a Social Economy Policy that includes "the world of the co-operative, mutual societies, associations and social enterprises, which operate outside of the spotlight of our GDP measures of economic success and societal wellbeing" (ILO 2018b). The idea is to create an enabling environment and support for these originations to connect the growing divides within the country since they operate on the entrepreneurial frontier responding to the nuances of poverty and catalysing opportunity. A link is made between delivering social change and earning an income (ILO 2018b).

Broadly, the guiding principle of social economy is the search for social, economic or environmental solutions that are not adequately addressed by the public or private sector and include enterprises and organisations such as cooperatives, mutual benefit societies, associations, foundations, non-profits and social enterprise (Borzaga, Salvatori and Bodini 2017). The International Labour Organisation relate the concept to enterprises and organisations, "which have the specific feature of producing goods, services and knowledge while pursuing both economic and social aims and fostering solidarity" (Borzaga, Salvatori and Bodini 2017: 1). South Africa's social economy policy is expected to provide a consistent and coherent framework for support to social economy enterprises and organisations with the development objective to promote access to decent jobs in a sustainable and inclusive social economy (ILO 2018b).

The megatrends mentioned above and the focus on the social economy have implications for development and care work, which is what this study is about. The research uses a case study in the care sector to deepen the understanding of the complexity of development issues such as poverty and inequality. The idea of creating a care economy and positioning care work as critical and part of a bigger conversation on approaches to job creation, poverty and inequality is part of the social economy. Both globally and in South Africa, socio-economic, demographic and environmental trends indicate that the deficits in care service will expand and exacerbate the care crisis. Care work and care economy are a system that consists of activities and relationships involved in meeting physical, emotional, and psychological aspects of care found in a variety of settings and across formal and informal economies. It is an integral component

of economies since care workers and those in need of care have sustained relational engagement, but it is largely undervalued in economies. There is an overlap in health, education and social services with other forms of paid and unpaid care that is often given, for example, by family and community members because there is a lack of access to quality services (ILO 2018a).

With the above in mind, the next section considers and suggests methodological lenses that could potentially deepen thinking on "holistic" care and development and more integrative ways of understanding economies and societies.

3.3 Methodological lenses – the approaches of Relational Thinking and human economy

The recent emergence of the idea of a human economy has brought activists and intellectuals together to question the dominant free market and command models of the twentieth century, but also to give priority to what people do and think, particularly in the global south (Hart 2013). The human economy is an umbrella concept that allows for new terrains of thinking about the economy by including humanity in its search for solutions. The idea is to move away from measuring wealth in terms of commodities, which has led to an increased waste of natural resources and rising inequality, towards a democratised economy with more sustainable ecological and social terms (Hart 2013). The human economy approach advocates for renewed public engagement, as well as a balance between regulation by the political authorities and public expression of a civil society focused on attaining the common good (Hart 2013).

The above is different from Oxfam's use of the term human economy, which was released in a paper titled 'A Human Economy Approach to Inclusive Growth in Africa', during the 2017 World Economic Forum (Oxfam 2017). Oxfam plays an important role internationally in highlighting growing inequality in the world and providing important suggestions for addressing inequality. However, their research and reports do not go as far as Hart's idea of human economy and continue within a neoliberal framework. It suggests that the "wealthy few" are expected to give some of their resources and money without addressing the deeper structural challenges of inequality and poverty, which reinforces power asymmetries. Oxfam's operationalisation of the term human economy reflects the argument made in the literature review that the neoliberal discourse tends to "co-opt" ideas that have developed over a long time from countering voices that are critical to the neoliberal narrative.

The human economy, as it will be used in this research, has emerged from a global social movement that started at the World Social Forum in 2001 and compels a more detailed study and consideration of alternative socio-economic ideas to "… explore economy from the vantage point of people's concrete activities and aspirations…", while also extending the range of inquiries to "take in the human predicament as a whole" (Hart & Sharp 2015: vii). Activists and intellectuals were brought together to not only question the dominant free market and command models of the 20th century, which are based on abstract and impersonal models of human behaviour, but to give priority to what people do and think, particularly in the global south. The idea is to situate people's behaviour within a fuller and more complex framework of understanding to question many of the assumptions made by economic models to date (Hart 2016). The human economy is an umbrella concept that is much more inclusive of finding solutions that include humanity and allow for new terrains of thinking about the economy. It is an alternative paradigm to the neoliberal ideology and should typically include the following (Hart, Laville & Cattani 2010: 5):

1. It is made and remade by people; economics should be of practical use to us all in our daily lives.
2. It should address a great variety of particular situations in all their institutional complexity.
3. It must be based on a more holistic conception of everyone's needs and interests.
4. It has to address humanity as a whole and the global society we are creating.

The idea is to move away from measuring wealth in terms of commodities, which has led to an increased waste of natural resources and rising inequality, towards finding new ways to democratise the economy and find more sustainable ecological and social terms for society and the economy (Hart 2013).

A network of scholars and activists have produced several books on alternative conceptions of the economy since the Forum in 2001, including *The Human Economy: a Citizen's Guide* (edited by Hart, Laville and Cattani 2010), which is a guide to the literature on concepts used to think about practical economic alternatives. In 2011, anthropologists Keith Hart and John Sharp started the Human Economy Programme (2017) at the University of Pretoria in South Africa with an interdisciplinary focus on coordinated empirical research with a more inclusive

geographical reach. The aim was to add the voices of African scholars (and scholars from the Global South in general) to the discussion.

The human economy is both academic and practical. Academically, the human economy is based on empirical investigation and comparison inspired by social and cultural anthropology. As an approach, the human economy uses empirical investigation to gain deeper understandings of people's experiences across time and space, and interactions with a variety of particular institutions through which people experience economic life (Hart & Sharp 2015). Practically, the human economy aims to promote economic democracy by helping people to organise and improve their own lives, which is why the findings must be presented to the public in understandable ways and for practical use (Hart 2013).

The human economy makes an important contribution to the literature on alternative development theories because it does not oppose either state socialism or free enterprise, which are more difficult to navigate when using terms such as social and solidarity economy. The International Labour Organisation (ILO 2018a) includes both social and solidarity economy as an alternative response to development. However, in the literature, the link between the two concepts is less clear. Social economy (as defined in section 3.2 of this chapter) still operates within capitalism, while solidarity economy challenges capitalism and the social relations upon which capitalism thrives (Laville 2010; Satgar 2014). Solidarity economy also emerged independently from social economy in Latin America and Europe through academics such as Luis Razeto in Chile during the 1990s and through Jean Louis Laville (2010) in France, respectively. Both social and solidarity economy focus on the role of people in shaping their economic lives and prioritise the welfare of people and the environment over profit and growth. However, the concepts are still under development, and the differences and similarities require greater clarification.

While the definitions and explanations of the meanings of a social and solidarity economy can be confusing and applied differently, the human economy approach uses a theoretical lens that tries to find ways to mediate the two paired antinomies – state and market, home and world – by synthesising these with an empirical and pragmatic focus on what people really do (Hart, Laville & Cattani 2010). Research conducted from a human economy approach was initially done by social anthropologists and historians, but has extended its interdisciplinary reach to sociology, development studies, political science, economics, geography, ecology, education,

philosophy and literature. This study will use the human economy as a research approach and method to deepen the research findings and analysis.

From a relational perspective, the human economy is understood as embedded in complex systems of relationships that allow for much more holistic approaches to the study of inequality and poverty. Recognising the theoretical importance of relationships requires new perspectives, new interpretive categories and new predictive models (Brown & Garver 2009; Mills & Schluter 2012).

Relational Thinking provides an analytical framework within which to study relationships and social networks more carefully. The Framework is a means to analyse reasons for the falling levels of 'social capital' or assessing the strength of stakeholder relationships in an organisation. The Relational Proximity Framework provides a model and analytical tool with comprehensive indicators to measure (quantitively and qualitatively) both organisational and interpersonal perceptions of the proximity or distance of relationships. The table below explains what the relational dimensions, drivers and their impacts are. The dimensions are broadly the different domains of relationships, and the drivers include different facets or indicators that are measured, which will be discussed in more detail in chapter four (section 4.4.2).

Table 1: Relational domains, drivers, descriptions and impact

DIMENSION	DRIVER	DESCRIPTION /EFFECTS	IMPACT
COMMUNICATION	**Directness**	Presence in the relationship is mediated by time, technology and/or other people, which influences the quality of the communication and experience of connection.	Clarity and connection
TIME	**Continuity**	Sequence of interactions over time enables growth and momentum of the relationship; builds story, conveys belonging and loyalty	Builds story, resilience and momentum
INFORMATION	**Multiplexity**	How information is gained enables breadth of knowledge; allows effective interpretation and management of the relationship; sense of being authentically known and appreciated.	Predictability and understanding
POWER	**Parity**	Distribution and use of power influences participation, fairness and experience of mutual respect in the relationship.	Respect and fairness
PURPOSE	**Commonality**	Considers depth, breadth and clarity of alignment of purpose; influences unity and synergy in the relationship.	Motivation and synergy

In the Relational Proximity Framework, the experience of the relationship is understood to be influenced by these drivers – they are distinctly related to the potential for reinforcing benefits and creating toxic relationships. The way in which these drivers combine will influence the overall outcome of the relationship. A relationship with high levels of *directness* can feel invasive if it lacks *commonality*, just as a relationship with high *commonality* and low *directness* can stagnate. Again, a relationship with high levels of *continuity* can feel like entrapment if lacking proper *parity*, just as the inverse characteristics can lead to insecurity and misunderstandings (Samuelson 2017; Ashcroft et al. 2017: 34).

The above domains and descriptions provide a framework with words, ideas, concepts and indicators that can also be used in the analysis of the data of this research. It helps to understand

more deeply how relationships between individuals or organisations and within groups work. Holistic development indicators are becoming increasingly important in the field of development, and the above configuration provides a conceptual framework as well as a series of questions that explore relational dynamics that are typically not captured or considered in the field of development.

The way that the RPF will be used in this research will be explained in more detail in the methodology chapter (chapter four) but below is a thick description of the meanings behind every relational driver as measured within the Relational Proximity Framework (Ashcroft et al. 2017):

1) *Communication (Directness)* is the use of contact to create an encounter and enable clear and effective communication in the relationship and includes mutual presence and contact – physical, intellectual, emotional and spiritual. Relationships are a series of interactions with contact between the parties involved – the way people communicate through media and other skills are fundamental processes of engagement and influence on others. Creating a sense of connectedness and the nature and extent of presence is influenced by factors such as time, place, medium of communication, skills employed and degree of openness.

2) *Time (Continuity)* is a series of interactions that introduce the time dimension in a relationship – duration and how some things continue from one interaction into another (as part of the same story). The use of time over a period of time creates a storyline and a sense of momentum and resilience in the relationship. Time allows relationships to grow, understanding to deepen and trust to be built. These interactions build up over time to create a storyline or narrative for the relationship that provides retrospective meaning and sets of expectations for the future. Successful relationships can build on previous interactions to create a sense of momentum. Positive encounters lead to trust, understanding and carrying through from interaction to another. Time is not wasted and does not have to start over, while building negative experiences are likely to deepen the bitterness of a feud. The sense of being part of a story is a major contribution to the feeling of rootedness and belonging to an organisation or a community that gives people resilience and confidence to adapt and grow.

3) *Information (Multiplexity)* offers understanding of others as a basis for tolerance and reliability, which is influenced by the ability to interact within a variety of sources and contexts.

The way information is gained as it continues from one interaction to another builds knowledge and an ability to respond in the relationship. How a relationship is conducted is influenced by what people know and the accuracy and completeness of that information. The nature, extent and quality of information about each party to the relationship are shaped by external factors, such as opportunities to meet in different contexts, openness of disclosure and discernment. People are seen in different contexts and situations over time. Consequently, deliberately or unconsciously information is gathered about those people to build up knowledge of them. The knowledge is used to invite their contributions, assess their needs and interests, judge their character and interpret their responses. The completeness and authenticity of this knowledge are influenced by varied sources of information, or contexts for gaining it, as well as the degrees of inquiry and disclosure that characterise the relationship. The sense of being known, and possibly being understood, is an important affirmation of the worth of a human being and has practical benefits. Information should bridge the gap of what we should know of the "other" person, parties or groups.

4) *Power (Parity)* is about respect and fairness in the distribution of power, risk and rewards, which are influenced both by complex distributions of power and by the way that power is used and expressed. Engaging with other parties in a relationship raises issues of power and the consequences of the way in which power is used, which influence the levels of participation and investment in a relationship. The use of power should ideally be to promote fairness and participation in the relationship and build mutual respect. There are many forms of power that can be distributed and used differently by various parties to a relationship. People's sense of fairness has a powerful influence on relational behaviour and people's willingness to participate in and contribute to a relationship depending on how fair or exploitative they think it is. An apparently unequal distribution of power will mostly be accepted by people if they think and feel that it is fair in terms of the distribution of different forms of power, structures and processes that support it, and the way people use and respond to power. Participation is influenced when there is a positive return or by fear of being hurt or treated unfairly. A person's sense of self is shaped, in part, by how others treat them. Mutual respect between individuals and groups is vital for health, social cohesion and the dignity of others, which in turn encourages contribution, responsibility and loyalty.

5) *Purpose (Commonality)* is about the sharing of purpose or values to create alignment and a sense of synergy and unity in the relationship. People are often brought together through a

common purpose that informs the desired outcomes of their relationship. People have different objectives and priorities, which makes the degree of alignment of purpose important as well as to the extent to which different purposes can be accommodated, valued and managed. The different purposes, preferences or accountabilities provide variety, which is interesting and creative. However, it must be managed in a relationship with strong alignment between persons, groups or organisations to prevent conflict and friction that can lead to instability and knock-on consequences for others.

Relational Thinking provides measurements with descriptions and language that will be used throughout the findings and analysis of this study. The use of language and terms in development theory and practice is often based on certain assumptions and specific worldviews that shape the way development is understood and determines development measurements and interventions. The following section will consider development terminology, meanings and measurements in more detail.

3.4 Critique of development concepts, language, meanings and measurements

The following subsections will elaborate on the language and meanings attached to development, as well as various indicators and measurements that have developed in development internationally and in the South African context (as the focus of this study). Subsection 3.4.1 starts with examples of language that are often used in development to illustrate why these terms can be problematic. Terms such as “participation”, “partnership”, “ownership”, “accountability”, “transparency”, “empowerment” and “poverty reduction” are used without further questioning the meanings attached to these terms. The below subsection will provide an especially detailed explanation of the concept “empowerment”, since it is frequently used in development practice without considering its meaning or the implications on individual and group relationships. The term “empowerment” (together with other development language) will also be examined in more detail in chapter five as it relates to the James 1:27 Trust as the case study of this research.

The remaining subsections in this section will detail the various measures of development used internationally and in South Africa to highlight the complexity of understanding development in multidimensional frameworks and to show why a relational approach can significantly

contribute towards measuring and understanding development. The first subsection will start with the significance and challenges of development "buzzwords".

3.4.1 Development, "buzzwords" and meanings

Development language, or so-called "buzzwords", are important in capturing growing challenges and framing solutions, but risk falling into development orthodoxies that become apoliticised and result in one-size-fits-all development recipes and formulas.

There are many factors that affect what happens in development practice, but discursive framings are also important in terms of what happens on the ground. Chambers (2005a) highlights six terms that have become prominent in development in recent years, including "participation", "partnership", "empowerment", "ownership", "accountability" and "transparency". He asserts that "all refer to power and relationships-, and all are used with hypocrisy: there is a gap between how the word is used and what it implies, and then what is done in practice" (Chambers 2005: 5).

The concepts and terms used in development influence how those who work in development think about what they are doing. The combination of various development terms, and particularly how words are combined, allow certain meanings to flourish and others to become less significant or overlooked. With the use of two contemporary development policy instruments, the Poverty Reduction Strategy Papers (PRSPs) and the Millennium Development Goals (MDGs), Cornwall and Brock (2005) show that the terms used in development are not neutral and acquire meaning as they are turned into policies. Take, for example, the terms "participation", "empowerment" and "poverty reduction". These terms are used in international development policy and framed in different configurations as a "seductive mix" to justify particular kinds of development interventions (Cornwall & Brock 2005).

The previous chapter started by showing that the meaning of development from the early twentieth century in mainstream thought linked poverty reduction to the cause of economic growth through macroeconomic stability, privatisation and liberalisation. Today the term "poverty reduction" has gained development consensus, but it is often still framed within the neoliberal notion of development as economic growth. Development language has grown significantly to include terms that "evoke a comforting mutuality, a warm and reassuring

consensus, ringing with the satisfaction of everyone pulling together to pursue a set of common goals for the well-being of all" (Cornwall & Brock 2005: 1045). It has also given legitimacy to development agencies to intervene in the lives of others, to bring about so-called "empowerment", "participation", "poverty reduction" and "development". But as Cornwall and Brock (2005: 1057) argue, terms such as participation, empowerment and poverty reduction come together in mainstream development discourse in a chain of "equivalence with ownership, accountability, governance and partnership to make the world that the neoliberal model would have us all inhabit. Dissident meanings are stripped away to ensure coherence."

Deconstructing particular aspects of development discourse to challenge its objective reality as a construct helps problematise dominant paradigms and open the way for alternative discourses (Chambers 2005a). Furthermore,

> "Some of these meanings might be recuperated through a similar strategy of using chains of equivalence that link these terms with other words to reassert the meanings that have gone into abeyance. In configuration with words like social justice, redistribution and solidarity, there is little place for talk about participation involving users as consumers, nor about poor people being empowered through the marketisation of services that were once their basic right. Nor is there a place for development solutions that fail to recognise how embedded richer countries are in the fortunes of others. Recognising the strategic reversibility of discourse is important, as it helps us to recognise that alternative ways of worldmaking can take shape even out of the most apparently closed discursive spaces" (Cornwall & Brock 2005: 1057).

Another term that is often used in development theory and practice is "empowerment" (Chambers 2005a). The concept of empowerment has various dimensions, different definitions and conceptual approaches and various operational implications. Empowerment can be viewed as a process or outcome, how power operates, strategies of inclusion or the implications of working with partners (Luttrell, Quiroz, Scrutton and Bird 2009). The concept of empowerment is often used in concrete situations as policy measure or technique with specific actions but is also used as an umbrella term for all sorts of help and positive change without necessarily defining what is meant by empowerment – to be empowered seems desirable in all kinds of contexts (Weidenstedt 2016).

The concept of empowerment can be traced back to Paulo Freire's seminal work, *The Pedagogy of the Oppressed* (1974) and has roots in other sources such as feminism, Freudian psychology, liberation theology, Black Power empowerment and Gandhism (Cornwall & Brock 2005). This is also known as "grassroots", "bottom-up" and movements that are driven from within, where the *empowerer* and *empoweree* are more or less the same unit. Self-empowerment is set in motion by people to empower the same people. Although empowerment does not have one single definition, it is mostly understood in relation to the specific needs of people who are yearning for empowerment. Empowerment is an interactive process, experience of change, and enabling of action to achieve influence over organisations or institutions that affect people's lives (Kabeer 2005). The focus is on the process in which people acquire social, economic or political power to liberate themselves from injustice (Wallerstein 1992). Empowerment can also be defined as a situation in which people, organisations and communities acquire the needed control over the problems that affect them (Manuere 2018; Rappaport 1981, 1987; Zimmerman 1995).

However, empowerment as "grassroots" can be distinguished from empowerment as "life/performance enhancement", where an *empowerer* wants to empower the *empoweree* through a dyadic empowerment relationship (Weindenstedt 2016). Much of the research and the use of empowerment in the field of development focus on empowerment as improving lives by transferring power resources in terms of education and employment opportunities, healthcare, or housing. People can also be empowered by more socio-psychological changes in terms of a sense of belonging and support (e.g. through friendship networks), inspiring work environments, or recognition of identities, character traits, performances, and achievements. Generally, transferring power resources will provide the receiver with more agential options, leading to a greater sense of control and self-efficacy. As has been shown, a greater sense of control can, in turn, have a substantial impact on life satisfaction and health (McFarland, Wagner & Marklin 2016; Ross & Mirowsky 2013).

However, despite its reputation, research has repeatedly shown that empowerment can have paradoxical effects. Respective fields of study have shown that empowerment efforts often lead to an 'empoweree' feeling indignation and resentment rather than empowerment (Botchway 2001; Danso 2009; Fraser 1989; Gruber & Trickett 1987; Hardy & Leiba-O'Sullivan 1998; Pease 2002; Rappaport 1987). A variety of problematic issues has been subsumed under the notion of the *paradox of empowerment* (Weidenstedt 2016). A more complex and critical

approach to empowerment focuses not only on structural empowerment but also communicative empowerment. This theoretically informed analysis of the processes that lead to the paradox of empowerment evolves from discrepancies between approaching empowerment from a structural versus a communicative viewpoint: *empowerees'* agency might be increased on a structural level but simultaneously decreased on a communicative level, leaving them feeling disempowered (Botchway 2001; Danso 2009; Fraser 1989; Gruber & Trickett 1987; Hardy & Leiba-O'Sullivan 1998; Kettunen et al. 2001; Labonte 1994; Lindner 2006; Pease 2002 and Rappaport 1987; Weidenstedt 2016).

The structural (economic) viewpoint on empowerment has an important contribution to make, but communicative empowerment contributes explicitly to this research as a relational way of understanding the dynamics within empowerment. As reiterated throughout this thesis, relationships are shaped by the actions and responses of individuals through interpersonal interactions, linkages or associations, encounters and experiences, where the "other" is known or knowable. Consequently, the action of each can affect the other within some shared context or motivation (Hinde 1997). A communicative viewpoint on empowerment deepens this relational lens, since it focuses on the dynamics of interactional situations, social actions and meanings, and pays attention to the reactions and responses of different parties, which gives greater access and insights into the perceptions of different parties.

Social actions (intentional and unintentional) inevitably involve a transfer of communicative meaning with a series of expectations, responses and reactions (Weidentedt 2016). Relationally, this involves examining what social interactions (and communication) are like between the *empowerer* and *empoweree*; what is revealed by the long chain of communication (continuity) between the *empowerer* and *empoweree*; and how the "social stock of knowledge" is shared between parties, since this determines to a great extent whether the "correct" communicative meanings are attached to actions.

When we consider healthy relationships as foundational to the well-being of societies, we need to understand the environment in which people relate and also why these relationships are important and how people influence them. However, to understand the actions and responses of people within an environment in which they relate requires a deeper understanding of *how* people perceive the relationship. A better understanding of a person or others is an important and valuable way of understanding the relationship and, therefore, to start understanding how

to create an environment in which relationships flourish (Ashcroft and Schluter 2005). This is where Relational Thinking proposes a fundamental shift conceptually, ideologically but also through practical tools to measure the dynamics of relationships in the development of people as a way of informing and shaping our understanding of the meaning of development.

Before considering relational measurements in more detail, the next section explores different models and measurements in the literature on development, which has been shaped by different development perspectives, as discussed in chapter two.

3.4.2 Measures of development: international perspectives, interpretations and models

As was discussed in section 2.2 in chapter two, the focus on neoliberalism and growth through Gross Domestic Product (GDP) has increasingly been questioned by those opposed to neoliberal policies, but also by scholars within the neoliberal literature. Even institutions such as the World Bank Group, the International Monetary Fund and various regional development banks who have promoted neoliberal policies as central are increasingly sceptical (Grzegorz 2011; Stein 2014; Scholte 2005). Moreover, there is a growing body of literature that has a fundamental problem with growth as a measurement of progress within societies and challenges this view based on the impact of neoliberalism (Fleming 2016; Fioramonti 2013, 2014; Hart, Laville & Cattani 2010; Harvey 2005; Kotz 2015; Satgar 2014).

Scholars and researchers argue that the narrow focus on inequality as centering around income is problematic, since inequality is not simply about wealth or lack of wealth and the growth ideology and "trickle-down" effect have failed to bring about important change in society. This suggests that there is a need to find other ways of determining "progress" in society, which includes more holistic understandings of the economy, poverty and inequality (Piketty 2014; Eisenstein 2014; Therborn 2006, 2013; Fredman 2007; Fraser 1996).

It seems that theories and debates on development from both dominant and countering perspectives have converged around the human development paradigm, which is currently regarded as the most holistic development model to address poverty and inequality (Alkire 2013). Key to the development of the human development paradigm is Amartya Sen's (2005) capability approach, which was advanced further by Martha Nussbaum (2001). They suggest

evaluating human well-being in terms of "capabilities" and "functionings", which moves beyond the analysis of primary goods, resources or utility. Sen's (2005) capability approach focuses on freedom as substantive freedom, individual agency and participation. The "capability and functioning deprivation" approach was an effort to move towards the greater well-being of people as part of development. The approach has also brought a shift in the works and analysis of economists. It provides perspectives from which there can be a critique of economic and political systems in which human beings realise or fail to realise their capabilities. Sen's approach also provides a theoretical basis for measuring human "flourishing". Individuals become the means and ends of development as subjects of development. "Functioning" is what a person manages to do or be and goods can enable functioning even though they are distinct from functioning (Deneulin 2006).

Sen's (1999) capability approach is often regarded as the ethical background, moral framework or core principle of the human development paradigm or approach (Fukuda-Parr 2003), which proposes that social arrangements should be evaluated according to the extent of freedom people have to promote or achieve the "functionings" they value (Sen 2005). Various indicators typically emerging from the human development paradigm include the Human Development Index (HDI), the Human Poverty Index (HPI), Multidimensional Poverty Index (MPI), the Genuine Progress Index, Ecological Footprint, Social Progress Index, Legatum Prosperity Index, Bhutan's Gross National Happiness Index, Happy Planet Index, Sustainable Development Goals and others, as will be discussed in more detail below.

These indicators reveal the shift away from growth to finding other ways of determining "progress" in society. In the 1990s, the United Nations Development Programme (UNDP) introduced the Human Development Index, which focuses on three measurable aspects of quality of life: living a long and healthy life, being educated, and having a decent standard of living. "Human development is first and foremost about allowing people to lead the kind of life they choose – and providing them with the tools and opportunities to make those choices" (UNDP 2004: 128). The Human Development Index, for example, developed the inequality-adjusted Human Development Index, which measures the actual level of development (UNDP 2010). Further developments included the Millennial Development Goals (MDG), which were replaced by a set of Sustainable Development Goals (United Nations 2015), which brings together more closely human, economic, social and environmental aspects of sustainable development.

Based on the above, CARE, Oxfam, UNDP and the British Department for International Development (DFID) have proposed various sustainable livelihoods models in their programming with slightly different focuses and components to their development programmes. Some examples include that of the French government, who appointed the Commission on the Measurement of Economic Performance and Social Progress (CMEP SP or also known as the Stiglitz-Sen-Fitoussi Commission) in 2008 to examine how the wealth and progress of a nation could be measured without relying on the unidirectional gross domestic product measure (Stiglitz, Sen & Fitoussi 2009). Another example is the New Economics Foundation (2017), a think tank in Britain promoting social, economic and environmental justice by using sustainability indicators that measure different aspects of life and the environment (Boulanger 2008). Closer to home, the African Human Capital and Labour Report includes various economic indicators, socio-economic indicators, education and skills development, healthcare, labour relations, employment trends, expatriates, and living standards in their measurements (Crous and Attlee 2014). There is also a growing interest in "subjective well-being", with increasing literature indicating that a wider set of concerns such as health and the quality of personal relationships contribute to perceptions of well-being at least as much as higher income does (New Economics 2017; Wilkinson & Pickett 2009). The following section will discuss South Africa's measures of development as part of the broader debates on development.

3.4.3 Measures of development: South African perspectives, interpretations and models

Extensive research and studies in development (especially on poverty and inequality) in South Africa also reflect the above shifts and changes in development measures. One of the first pivotal studies on poverty in South Africa that revealed the complexity of the issue was done in 1982 by the South African Carnegie Commission (Wilson 1984). The Carnegie Inquiry consulted almost 300 academics, political and social activists and humanities specialists and worked collaboratively with different racial groups in South Africa, which made it a multi-racial inquiry. The Carnegie Corporation did not define the target populations of the study or the specific definitions of poverty, since it was expected that poverty would be defined by the people themselves. Income was one of the main measurements, but included various other indicators for a "fuller" understanding of poverty. The focus of the study primarily became "black" poverty in rural areas. The investigators travelled to and lived in rural communities,

and the inquiry found that “black” rural poverty was far more extensive and devastating than realised (Clark 2006; Wilson 1984). This inquiry highlighted that understandings, definitions and measurements of poverty are complex and cannot be limited to one-dimensional approaches. The analytical work on poverty and inequality in South Africa has continued through a range of studies.

The work on poverty and inequality in South Africa has grown in methodological complexity and analytic sophistication through various studies of both longitudinal and quantitative surveys as well as micro-qualitative studies of households and smaller units of analysis. Studies in South Africa include both one-dimensional and multi-dimensional approaches to define and measure poverty and inequality.

Data on income poverty in South Africa has been produced by the national statistical service of South Africa (StatsSA) since 1996. StatsSA uses the one-dimensional or traditional approach to developing poverty lines by defining poverty as people whose consumption expenditure is below the defined poverty line. The money-metric or monetary approach uses a set of three poverty lines – the food poverty line (FPL), lower-bound poverty line (LBPL) and upper-bound poverty line (UBPL) across all the provinces, and these are updated annually using the Consumer Price Index data. StatsSA (2014a) also uses subjective approaches to measure poverty, including the self-perceived wealth question (SPWQ), minimum income question (MIQ) and the income evaluation question (IEQ).

However, poverty is also defined and measured multidimensionally using the South African Multidimensional Poverty Index (SAMPI), based on the global Multidimensional Poverty Index (MPI), which will be explained in section 4.4.3 of chapter four (Alkire & Santos 2010; UNDP 2019). The MPI is used as an attempt to complement and move beyond one-dimensional money-metric poverty measures to capture multiple aspects that constitute poverty, amounting to a person’s experience of deprivation, including “poor health, lack of education, inadequate living standards, lack of income, disempowerment, lack of decent work and threat from violence” (StatsSA 2014b: 3). A wide range of indicators can be selected. It can vary from country to country, which also captures the complexity of poverty and provides a more robust tool to inform research, programmes and policies. Similar to the MPI, SAMPI uses the Alkire and Foster model from Oxford University for the United Nations, which complements traditional/expenditure-based poverty measures and has adjusted and included more country-

specific conditions and needs. Additionally, South Africa uses the Living Standard Measure (LSM) to define and measure poverty.

Research shows that patterns of poverty and multiple deprivation in South Africa are not random but reflect the outcome of dynamic social processes and factors, including migration, availability and cost of living space, community preferences, current and historical policies (Noble 2014). Noble (2014) uses the South African Index of Multiple Deprivation (SAIMD) 2011 at ward level and an analysis of income poverty at ward level to present a diagnostic report evaluation of poverty and multiple deprivation (including material deprivation, employment deprivation, education deprivation and living environment deprivation) in the Eastern Cape Province. The different dimensions or domains such as employment and education deprivation have separate measurements but are combined in the SAIMD 2011 into a single measure of multiple deprivation, but can also be used individually as a domain-specific index of deprivation as well as using income poverty lines analysed at ward level across the province. Documenting the spatial distribution at a small area level is revealing of the legacy of apartheid, but is also useful in analysing the overall index of multiple deprivation and its component domains for a more nuanced picture.

One of South Africa's most important surveys is the National Income Dynamics Study (NIDS), as the first national panel study which has been repeated over time to analyse poverty in South Africa. The Programme to Support Pro-Poor Policy Development (PSPPD) was established and located within the Department of Planning, Monitoring and Evaluation (DPME) as part of the larger European Union-funded National Development Policy Support Programme (NDPSP). The PSPPD is a research and capacity-building programme aimed at improving evidence-based policymaking (EBMP) on poverty and inequality at national and provincial levels. The National Income Dynamics (NIDS) is the "first national household panel study of income dynamics among individuals of all ages in South Africa to track and understand the changes in the lives of South Africans, rich and poor" (PSPPD 2016). The study began in 2008 through the selection of a sample of 28,000 nationally representative individuals from 7300 households across the country (Finn et al. 2010). The survey was undertaken with the same household members every two to three years, with the repetition being part of the ongoing statistical investigation to interrogate the dynamics of poverty and inequality, explore the reasons for the high levels of both and to search for solutions (PSPPD 2016).

NIDS assists researchers and practitioners by revealing the dynamic structure of households in South Africa and changes in the living conditions and well-being of household members over time. It can follow people as they move out of their original households and provides information about how households cope with positive and negative shocks, social mobility, the extent of poverty, members' well-being and the impact of government interventions. Other themes include household composition and structure; fertility and mortality; migration; labour market participation and economic activity; human capital formation, health and education; vulnerability and social capital. For example, data from NIDS has been used to measure the impact of trust as a critical indicator of societal cohesion on a persons' access to resources, well-being and neighbourhood affiliation related to demographics (MISTRA 2016).

Others use indicators of multiple deprivation to demonstrate the spatial considerations in South Africa. Noble and Wright (2013) show that the most deprived and impoverished areas correlate with the old labour reserves or former "homelands" of South Africa. The correlation between the poorest areas and former "homelands" strengthens Kate Philips' critique of the concept "two economies" as propounded by President Thabo Mbeki and highlights the consequences of the migratory labour system in the country. Mduduzi Biyase distinguishes further between the rural and urban patterns of poverty and inequality as well as the geographic and racial patterns. In his analysis, poor South Africans are typically female, African, rural and vulnerable to external shocks due to their economic position (Noble and Wright 2013).

Measurement and indicators have also been used to examine trends in social cohesion, inequality and ethnicity in South Africa. David et al. (2018) examine recent trends in social cohesion and inequality, and the relationship between the two in South Africa, using data from the South African Reconciliation Barometer Surveys. Interracial interactions are used as the primary approximation of social cohesion, and the multidimensional Living Standards Measure is used to assess the level of well-being and inequality. The key finding of the quantitative research is that there is a significant relationship between individuals' perception of inequality and their level of interracial interactions. Neff (2007) explores ethnicity in South Africa as an insightful analysis of poverty and well-being. Neff uses two poverty measures (monetary poverty and capability poverty) and one subjective well-being measure (life satisfaction) as an alternative multivariate technique of categorical data to help identify the underlying structures of independent causalities. Neff's findings reveal important influences for individual variation within ethnic groups in income or expenditure and subjective well-being and the complex

connection between education, age and location. It further shows the increasing intra-group divide between rich blacks and poor blacks as the main driver of inequality.

Research on poverty and inequality in South African has shown that its causes are complex. In this regard, Wilson and Cornell (2012) argue that the economy should be located in a network of gendered, spatialised and racialised relations. "Poverty is widespread; inequality is profound; and the causes are complex, interactive and have deep and dynamic historic [sic] roots" (Wilson & Cornell 2012: 7). Wilson and Cornell (2012) provide a useful understanding of poverty and inequality by using George Ellis's terms of the "complex set of interlocking factors", as well as Braam Hanekom's identification of the four pillars that perpetuate poverty and inequality, namely: structural causes, education, psychological reasons, and the moral fabric and values of the South African society (Wilson & Cornell 2012). The multifaceted and multifactorial nature of poverty and inequality show a deeper connectedness and interdependence of the economic, social, cultural and psychological (Esau and Leibbrandt 2017).

The human development paradigm has played a critical role in the above multidimensional measurements both globally and in the South African literature, but the paradigm does not go far enough to develop understandings of how relationships work and the role of relationships between people, organisations and groups in development. An example of this is the Sustainable Development Goals (SDGs), which have developed within the human development paradigm. The SDGs are supported by most governments today and have many positive features. For example, they connect injustice with financial poverty; focus on the breadth of concerns that demonstrate the growing awareness of the importance of education and health for individual self-determination and fulfilment, and recognise the prevalence of discrimination against women. However, the underlying worldview that focuses on individual rights has grown from "Western" legal discourse and practice rather than reflecting the balance of responsibilities and obligations as reflected in many other parts of the world (Schluter 2016[2]). The same can be said about Amartya Sen's Capability Approach, which has been

[2] See Schluter 2006, *What Charter for humanity? Defining the destination of 'development'* on traditions, values, cultural and religious beliefs and definitions of "the good" which is seldom taken into account in the literature on development, how other cultural and religious traditions set their social priorities and why they are critical of development thinking.

critical in shaping the human development paradigm and informing measurements and tools of development such as the HDI. The following section will turn to this argument.

3.5 A critique of the human development paradigm and a case for Relational Thinking

From a Relational Thinking perspective, a critique of Sen's capability approach within the human development paradigm is that it leans towards being a more individualistic perspective to poverty and, like all development theory, lacks a relational perspective on development. Sen does not neglect social issues but approaches them as subsidiary to individual human well-being.

Sen's social focus is on socially dependent individual capabilities, and, in this regard, he speaks of collective capabilities. He does not speak about social capabilities, yet, the social settings of individuals are critical. Humans are social creatures, and individual freedom can be argued to be a social product (Deneulin 2006). The capability approach gives a less than adequate account of social "flourishing", instead offering a social matrix of individual "flourishing", which forms part of social capability. Capabilities and rights should not only be viewed from an individualistic perspective. Capabilities are linked to the recognition of self and rights to the recognition of others. In this way, capabilities and rights are connected through reciprocal relations (Ricioeur 2006). This study suggests that capabilities and functionings should also be viewed as "relational capabilities and functionings".

The liberal focus on individual liberty as moral value and basic criterion for justice leaves out the importance that society and social institutions have in constituting individual identity, which provides conditions of meaningful individual freedom. Free choice in individual capabilities contributes to revealing the restrictions women face due to their subordination to familial, social and religious interests (Nussbaum 2001). However, the focus on individual liberty and choice as controlling value less frequently examines how the basic value of "non-instrumental" respect for the individual could be enhanced by social participation and responsibility, which is important in many non-Western cultures (Cahill 2006). The sociality of the person must be taken more seriously, and more value should be placed on persons as inherently embedded in and constituted of social relationships. Belonging to an intergenerational family is an important component of human identity, self-determining freedom and as a precondition of healthy, moral and social development (Cahill 2006).

Arguably, the exercise of human freedom and choice can also not be separated from history and community. From a Relational Thinking perspective, the capability approach needs "thickening" through a better understanding of socio-historical contexts, the importance of relating to others and the influence of power in causing, perpetuating or transforming unjust structures (Deneulin 2006 and Alkire 2006). Sen has a narrow view of human beings within economic theorising, focused on what people have rather than what they are and their selfhood (Phelps 2006). Yet, human 'doings' and 'beings' include achieving self-respect and being socially integrated, as part of self and mutual recognition. Human action is a mode of human sociality. We cannot act alone or in isolation from others; societies emerge from power and cooperative action. The organisation of people arises out of acting and speaking together; therefore, the true space lies in living together for this purpose (Phelps 2006). Ultimately, the meaning of personal action cannot be reduced to the intention of the individual agent, but to actions in social networks, which also means that the outcomes are essentially unpredictable and need measures to study social networks much more carefully (Deneulin et al. 2006).

From a Relational Thinking perspective, the goals of society are defined in relational terms, focusing on 'relational proximity'. It relies on a shared human appreciation that the quality of relationships and issues of identity, security, self-esteem and interdependence are key to development and personal well-being. As an example, in the early 2000s, the Voices of the Poor project of the World Bank published three books with findings from a team of researchers who listened to 60,000 of the world's poorest people speak about how poverty, oppression, and injustice were negatively affecting their lives and what they believed human well-being might be (Narayan-Parker 2000). The feedback included more food, better health and access to education, but the conversations quickly moved beyond these more obvious material desires to the expression of well-being as relational. Social well-being seems central to human well-being of the poor, and the desire to take care of one's family, harmony in the family and community, having friends, and helping others showed up with regularity in the interviews. Other elements of human well-being that were named included a sense of dignity, respect, peace of mind, lack of anxiety, being God-fearing, happiness or satisfaction with life (Narayan-Parker 2000). Factors such as dignity and respect relate directly to the importance of relationships.

However, there is an objection to shifting away from focusing on growth of income to relational measures of well-being, namely, that it is a betrayal of those who lack basic needs. Schluter (2006) points to two studies with empirical evidence that suggest otherwise. The first study on

the life satisfaction of slum dwellers in Calcutta found that the respondents report satisfactory social lives, rewarding family lives and a belief that they lead moral lives. Schluter (2006) concludes that "while [they] do not lead enviable lives, they lead meaningful lives." Correspondingly, in a subsequent study in Bangladesh, relationships used by poor people to secure their livelihood were found to be hierarchical, exploitative and sometimes violent. Schluter concludes that "The pleasure of good relationships and the pain of unjust relationships matter to the destitute" (Schluter 2006: 3). From this perspective, issues such as food security for the poorest are an essential a precondition instead of a goal of social change. Understanding relationships better is a way to deal not only with the symptoms but also with the causes if the broader goals of society are considered (Schluter 2006[3]).

That is why this research suggests exploring Relational Thinking as a conceptual framework and the Relational Proximity Framework as a measurement to better understand how people perceive relationships with others and to place more value on people's well-being embedded in and constituted of social relationships. Relational Thinking suggests a conceptual framework with tools that focus not only on individualistic or collectivist understandings to quantify how well people or nations are doing, but to study the well-being of people in terms of the perceived wellness of relations between people – this is termed a relational approach (Ashcroft & Schluter 2005).

Chapter four will explain how the relational thick descriptions, drivers and facets as described in section 3.3 of this chapter were used to better understand the workings and relationships of the case study for this research, namely, the James 1:27 Trust. As mentioned, the Trust is an NGO in South Africa, and the next section attempts to explore the literature on the significance of NGOs in development as a way of situating this case study.

3.6 The role of NGOs in development

The role of non-governmental organisations (NGOs) in development forms part of the tri-sector – state, market and civil society – perspective as discussed in the literature review in section 2.2.3 of chapter two (Fowler 2013). This section will highlight literature on the role of NGOs

[3] See Schluter 2006, *What charter for humanity? Defining the destination of 'development'* on measuring relational well-being

in development and give an example of the risks for NGOs in using specific standards that may not reflect the realities of those that supposedly benefit from the work of NGOs. This example is also relevant to the case study of this research, which will be analysed in chapter five and six.

In chapter two, an overview of development since the 1940s highlighted debates on development and underdevelopment in developing countries. Various theories and development practices suggested different state-market-civil society solutions to underdevelopment in developing countries. Development agencies, such as the World Bank, from around the 1980s, increasingly supported professionalised and modern NGOs that were funded by Northern donors (governments, intergovernmental organisations and private foundations) targeting countries in the global south. The idea was to shift away from state-centric approaches to development with the assumption that NGOs have closer proximity to citizens in developing countries and would be more accountable to and be able to serve citizens more effectively (Chahim and Prakash 2014 and Christie 2012). Economically, NGOs were viewed as market-based actors able to deliver social welfare services to poor people at lower cost and higher standards of quality than the government (Fowler 1988 and Meyer 1992). Politically, NGOs also became a vehicle through which to drive particular normative concerns and promotion of liberal democratic views and ideals such as democratisation, freedom and human rights. The recipients of aid were NGOs and grassroots organisations who were supposed to act as a counterweight to state power, opening up channels of communication and providing avenues for greater participation for various groups within society, especially the more marginalised (Chahim and Prakash 2014).

Due to the narrow focus on NGOs as vehicles of development, (official) aid has steered many civil society organisations towards a limited set of functions as providers of social services; builders of civic competencies and capacity; (policy) advocates for the poor, marginalised and oppressed; and active democratising watchdogs for the public good. Adopting this apolitical, utilitarian perspective gives rise to an incongruity: in performing these tasks, aided civil society organisations are often treated as separate from the citizenry that rationalises them (Fowler 2013).

There has also been increasing resistance to foreign-funded NGOs, especially by state institutions, viewing them as antinationalist agents of capitalism, “Western” and empirical

values (Fisher 1997). Some critics have argued that NGOs are more loyal to donors than to their constituencies and are likely to become the community face of neoliberalism (Pearce 2010). This raises the possibility of donor dominance, which limits the autonomy of NGOs, who often divert from their core business to comply with donor driven-agendas. As NGOs align themselves more and more with donor agendas, they lose their popular legitimacy (Banks, Edwards & Hulme 2015, Edwards 2005; Edwards & Hulme 1995, 1998). A further challenge for NGOs is that they are staffed by urban, educated, middle-class liberals who do not necessarily understand the reality for most members of their societies (Fowler 2013). NGOs typically use a technocratic approach to poverty and development that does not allow for a better understanding of the power relations that exist in the societies where they operate because they are largely distant and removed from those contexts (Shivji 2007).

The case study of this research is on an NGO in South Africa who works with children and youth, which is why the following example will be given as an illustration of the challenges of NGOs as mentioned above. The NGO uses the standardised USAID Child Status Index (CSI) (2009) as a tool to identify the needs of children and create care plans to monitor the well-being of children and households in a care programme. It is an instrument that can be used in assessing and tracking "priority services" to a "vulnerable" child and household, as well as for initial assessment and follow-up monitoring. The CSI can be placed in conventions such as the United Nations Conventions on the Rights of the Child (UNCRC). The NGO operates with codes of conduct, rules of engagement, standards, policies, procedures, processes and practices aimed at reporting against UNCRC standards. The organisation uses the UNCRC standards since they are the only existing and comprehensive standard with defined articles, written in law and ratified by the South African Parliament. A point of contention from a relational perspective is the use of the UNCRC guidelines without further investigating the premises on which they are based.

The previous section offered an extensive critique of Sen's capability approach and the human development paradigm, and they were described as principally individualistic in approach and lacking in a relational awareness in relation to development. In Sen's approach, social issues are addressed as subsidiary to individual human flourishing (Cahill 2006; Deneulin 2006; Phelps 2006; Ricioeur's 2006; Schluter 2006). Similarly, concerns have been raised about the UNCRC as still largely biased in favour of "Western" norms and standards without enough consideration of and sensitivity to cultural differences and diversity (Quennerstedt et al. 2018).

It remains individualistic and skewed towards rights without emphasis on the duties and responsibilities of parents, caretakers and children (Harris-Short 2001).

Even though the drafting process of the CRC was encouraging as a model of inclusive norm creation due to the level of participation by various groups, the end result is marked by heavy "Western" bias and still far from fully inclusive, lacking in respect for social and cultural difference (Harris-Short 2001). During the convention drafting process of the UNCRC, a consensus was produced regarding respectively civil and political rights, as well as socio-economic rights, but "different and inconsistent children's rights logics underlay the formation of these respective consensus-formations" (Quennerstedt et al. 2018: 38).

The focus on individual rights as controlling value less frequently examines how the basic value of "non-instrumental" respect for the individual could be enhanced by social participation and responsibility, which are important in many cultures in the global south (Cahill 2006). More attention should be given to developing culturally sensitive approaches in Early Childhood Development services, which will require changes in attitudes, approaches, methodologies, and service provision (Nsamenang 2008, 2013).

There are policies and practices that form an integral part of philosophical traditions in the global south, which places much greater emphasis on recognising and understanding the relationship between right and duties. The African Charter on the Rights and the Welfare of the Child (OAU 1990), for example, includes in article 31 that in addition to rights, the child has specific duties and responsibilities towards their family and society, the state and other legally recognised communities and the international community. Included in this is the child's responsibilities to work for the cohesion of the family, to respect parents, superiors and elders and to assist them in case of need. Another point to highlight in the Charter is the child's responsibility to preserve and strengthen African cultural values in their relations with other members of the society, in the spirit of tolerance, dialogue and consultation and to contribute to the moral well-being of society (Quennerstedt, et al. 2018).

South Africa's domestic law has a traditional system of adoption alongside a formal adoption process, which gives greater recognition to the idea of traditional systems and the role of extended family. In extended families, the grandparents and other members of the family play an essential role in supporting the development and care of the children (Harris-Short 2001).

One way in which South Africa is attempting to draw on the strengths of the extended family system is to 'encourage the placement and adoption of HIV-positive orphans or orphans with AIDS within the extended family and in the community'. It is entirely feasible to argue that these informal adoption arrangements, based as they are on the role of the extended family, serve the best interests of the child. In a society based on the model of the nuclear family, informal adoption within the extended family might not work. Care of the child would, therefore, be entrusted to strangers. Where, however, the extended family lies at the heart of the social organisation of a community and members of the extended family are willing and able to assume the care of a child, informal 'adoption' can often provide an appropriate solution (Harris-Short 2001).

The above challenges the standards according to which NGOs tend to operate, but questioning the meanings and roles of NGOs as "vehicles" of development in the civil society discourse reveals that NGOs need to be understood not as a homogenous group but as a range of different actors with different agendas and ways of operating within their unique local and historical contexts (Mercer 2002). Critically assessing NGOs requires questioning selective examples and generalisations that illustrate the advantages of these organisations and attend to the ideology and politics of both the associations and the analysts (Fisher 1997). An assessment of the impact of NGOs requires a much more holistic view of these organisations. Emphasising the role and importance of NGOs may rest in ideological grounds rather than empirical verification, which means much more emphasis should be placed on verifying its performance.

An extensive study on the literature on NGO performance and the factors influencing NGO performance suggests that more research should be done on factors influencing NGO performance (Kareithi and Lund 2012). The study also revealed that NGOs tend to neglect finding out what beneficiaries' perspectives are in their performance research, despite the rhetoric of participatory development; and the low number of published researchers in Africa and minimal collaborative efforts between 'Northern' and 'Southern' researchers in this field. Another comprehensive and interdisciplinary review of the literature on NGO and NPO effectiveness using citation analysis suggests enhancing efforts at crossing disciplinary divides, adding empirical analyses, and paying increasing attention to developing shared categories and methodologies in understanding NGO/NPO effectiveness (Lecy, Schmitz and Swedlund 2012).

The brief literature overview in this section on the role of NGOs in development located NGOs in the broader discussion on development. NGOs form part of the development discourse and the different meanings, standards, understandings and measurements attached to development theory and practice. There are many questions about the importance and role of NGOs in development, including questions on their impact in societies. This chapter highlighted some of the challenges around development standards, language and measurements and this section is a bridge to examining the conceptual thought and practical work of an NGO in South Africa. The above fault lines of development theory and practice will be considered in the analysis, but the relational perspective aims to provide a deeper and more layered evaluation of the case study.

3.7 Conclusion

This chapter underscored that development theories are increasingly grappling with the multifaceted challenges, complexity and multidimensionality of poverty and inequality. However, the proposed solutions to development often misdiagnose the problems because of the development philosophies that shape the questions, measures and interventions of development. There has been a significant increase in development debates and the emergence of tools allowing for more integrated measures of development. South Africa has also attempted, through research, frameworks, policies and measurements, to address development challenges more effectively, but has failed to do so.

The human development paradigm is prominent in the literature globally and in South Africa in measuring development, but this paradigm tends to emphasise the individualistic rather than the social and does not address relational questions in development. In chapter one (section 1.5), healthy relationships were defined in terms of the relational drivers of RPF, and throughout the thesis, the health of relationships between people has been suggested as a measure of how well a society is functioning. This chapter builds on this by attaching a person's well-being not only to their individual capabilities or functioning but to the health of relationships between individuals and groups within society. The chapter showed the importance of relational perspectives in the development discourse, but also the need for greater recognition of the importance of relationships in approaching development issues both conceptually and through categories and predictive models.

A relational society requires a relational framework with instruments and language that are complex yet measurable. It also requires research on cases or phenomena within society that can provide insight into alternative ways and practices that attempt to move away from the mainstream and underlying assumptions towards different ways of structuring society. The study will follow two different but intrinsically related processes. On the one hand, it uses relational indicators and research methods to analyse development. On the other, it analyses ideas, concepts and practices of a South African organisation, namely, the James 1:27 Trust, which claims to have alternative ideas for structuring society in more relational and caring ways. The methodology and relational tools employed in this research will be explained in the following chapter.

CHAPTER 4: RESEARCH METHODOLOGY

4.1 Introduction

Chapters one, two and three reviewed the literature on development studies and demonstrated how poverty and inequality have been approached in development theory and practice. This chapter details how the empirical data for this study was gathered. This research is situated in the interpretivist paradigm but uses mixed research techniques, borrowing from qualitative and quantitative approaches to explore a relational approach to the study of development. Importantly, the data process and content revolved around the same research objectives that chapters one to three sought to examine. These objectives are:

1) to examine the relational dynamics between a South African NGO (James 1:27 Trust) and the households under their care.
2) to use Relational Thinking and the Relational Proximity Framework as methodology in understanding the relational dynamics between different people and groups.
3) to analyse how perceptions on the quality of relationships between people influence development.
4) to reveal methods and indicators that are not often considered in development studies.
5) to understand how relational dimensions and indicators relate to development theory and practice.

The case study research method is commonly used to conduct research in the discipline of political science and provides information-rich data for an in-depth study on the James 1:27 Trust. The case study was studied critically and framed within Relational Thinking to examine how the emerging themes from the data inform the idea of a relational economy.

The data was collected in various ways. A document analysis of the Trust documents provided the researcher with the necessary background information on the organisation and formed part of examining the concepts and practices of the Trust. The following step was to identify the key relationships in the organisation, with a particular focus on the Trust care team and household members under the care of the Trust (explained in section 4.4.2). A household refers to a group of people who live together at least four nights a week, have high levels of relational proximity and share resources (StatsSA 2013).

The relationships were measured through the Relational Proximity Framework, which provides quantitative data on the "distance" in the relationship between people or organisations, which determines how well each is likely to engage with the thinking, emotions and behaviour of the other (Ashcroft et al. 2017). The indicators measured in the relationship include directness, continuity, multiplexity, parity and commonality. Following the quantitative research conducted, the qualitative research was collected in the form of in-depth interviews, a focus group and observation research. The research also used the Multidimensional Poverty Index, which forms part of the human development paradigm (as explained in section 3.4.2 of chapter three) to compare the human development of households under the care of the Trust with households in the same area without interventions from an organisation. The reason, as will be detailed in chapter five and six, was to compare the human development status of these households and then to examine the nuances that emerge when the relational results on the Trust were considered.

Multiple research techniques in the form of surveys, in-depth interviews, focus group discussions, participant observation and secondary data sources were used to triangulate the data and strengthen the study. With the research objectives in mind, the following section describes the methodological framework that was employed.

4.2 Research approach, design and methodology

The study used an interpretivist approach. Interpretivism is an approach that seeks to understand experiences, meanings and interpretations of a subjective social phenomenon (Saunders, Lewis and Thornhill 2016). In this study, the research explored the underlying facets of development to uncover the subjective experiences and interpretations of the social actors involved in the James 1:27 Trust. Following the interpretivist philosophy, the research used a "systematic set of procedures to develop an inductively derived theory about a phenomenon" (Strauss and Corbin 1990: 24). In line with the inductive approach, which is explorative in nature, this research did not confirm a pre-determined theory but was used as research method and tool to assess the consistencies, contradictions and trends of "emerging perspectives" through a critical analysis of the Trust. Inductive approaches, according to Saunders et al. (2016), should be applied to small samples.

As a case study, the research critically examined a non-profit social enterprise called the James 1:27 Trust. It is one of many organisations working with children and youth affected by the HIV/AIDS pandemic in South Africa and is based in South Africa's executive capital, Pretoria. The organisation claims to have innovative practices, ideas and conceptualisations that include developing a relational and care economy to address issues such as poverty and inequality in South Africa.

Based on the above, the study applied a mixed-method approach by combining quantitative and qualitative data collection techniques and analysis procedures, which will be explained in more detail later in this chapter. A mixed-method approach refers to the use of both quantitative and qualitative data collection techniques and analysis procedures from multiple paradigms. Triangulation mixed-methods design, which this study employed, is the use of two or more independent sources of data or data collection methods to corroborate research findings within a study (Tashakkori et al. 2015). The process of triangulation can strengthen findings by combining different tools to capture different views and subjective factors necessary to elucidate complex social situations (Jogulu and Pansiri 2011). In this design, qualitative data collection and analysis was followed by quantitative data collection and analysis. Although this research is interpretivist in approach, and therefore primarily a qualitative study, it was informed by the quantitative collection and analysis of the data.

Mixed-method research designs can be complex and require time, skills and resources, as was the case with this study since the collection and analysis of the data were done in separate phases. The researcher has received training as a relational practitioner at the James Social and Ethics Consultancy (JSEC) and had access to relational practitioners to assist with the analysis of the Relational Proximity Framework to ensure that the necessary skills were employed for accuracy and rigour in analysing the data. The Relational Proximity Framework is a complex quantitative tool with various drivers, sub-categories and facets that needed extra expertise and skills. The researcher learnt how to interpret and analyse the data but used the assistance of an expert in quantitative analysis for greater rigour and accuracy (as would be the case if working with complex data sets in SPSS or other quantitative data programmes). The researcher analysed the final relational (statistical) report as it informed further qualitative interview questions.

Despite the skills and time required in mixed methods, Tashakkori and Teddlie (in Saunders et al. 2016) argue that multiple methods are useful if they provide better opportunities to answer the research questions and where they better evaluate the extent to which the research findings can be trusted, and inferences made from them. Mixing data sets can yield more complete evidence and a better understanding of the problem, which provides the researcher with greater breadth and depth of the phenomenon studied. Mixed method research also allows for the assortment of divergent views and perspectives, and alerts the researcher to the possibility that issues are more multifaceted than initially supposed (Delport & Fouché 2011).

4.3 Sampling of the case study

The case study was selected through purposive sampling. There are two "broad" kinds of sampling available in social science research. Probability sampling is often associated with quantitative researchers, whose goal for the sampling procedure is to get a representative sample of the bigger population and produce accurate generalisations about the population (De Vos 2011).

On the contrary, in non-probability sampling, the researcher does not know the population size or the members of the population, making it less standardised and non-representative (De Vos 2011). In non-probability sampling, the focus for researchers is on how a small sample or small collection of cases illuminates social life or the phenomenon being studied to clarify or deepen the researcher's understanding about the phenomenon under study (Ishak and Bakar 2014). The main forms of non-probability sampling include quota sampling, purposive sampling, snowball sampling, self-selection sampling and convenience sampling. Purposive sampling is the most suitable technique for this study. It is also the most commonly used technique in case study research. Purposive sampling is applied in small samples, which provides the researcher with information-rich cases worth in-depth study (Patton 1990).

There are different ways of identifying cases in purposive sampling, including a deviant or extreme case, a critical case, a convenience case and politically significant case, among others (Tesol 2018). The James 1:27 Trust was chosen as a critical case, which is particularly useful in exploratory qualitative research where a small or single case can be used to explain the phenomenon of interest. As a critical case, research on the Trust will be used to gain deeper insights into understanding development from a relational perspective. The idea is to apply

Relational Thinking and the Relational Proximity Framework to a particular case to help make logical generalisations about the themes that emerge from the data and how it can inform a relational economy as part of understanding development. However, such logical generalisations are not statistical generalisations and will be made carefully (Palinkas 2015).

As an NGO, the Trust has a wealth of data and information that it has developed over the years. They claim to have complex ideas, concepts and systems for building a relational society or "a society that cares for every person" (James 1:27 Trust 2018). The Trust combines holistic care with innovation and social enterprise development. The researcher has been involved as a volunteer at the Trust since 2015. Their ideas and practices initially seemed intriguing, but it quickly became evident that their "innovative ideas" pose risks. It is these potentials and risks that the study is interested in unpacking.

The culture and leadership of the Trust and how the organisation uses relational ideas in their interactions and engagements are important to this study. The Trust was purposively selected as a case study because of this, since the way in which the Trust prioritises relationships in their care model offers a model to test some of the key tenets of Relational Thinking. The relationships that were measured and the interviews that were conducted were intentionally selected to produce rich data to highlight some of the complexities and nuances of the different relational dynamics.

The researcher's involvement and participation in the organisation provided a level of depth, insight, knowledge and understanding that would not otherwise be possible. However, choosing the case study through purposive sampling has had its risks. The selectivity of the researcher may lead to distortion of the findings since the researcher has been involved with the Trust for the last five years. The researcher's involvement with the Trust poses risks and biases that could subconsciously be adopted within the research findings. For example, the close involvement with members of the organisation can influence what the researcher chooses to record as relevant and important, while the researcher's world view invariably affects how the data is interpreted and evaluated. It is therefore vital to be conscious of these risks through what Peter Reason (1995: 12) refers to as "critical subjectivity". At every point in our research – in our observing, our interpreting, our reporting, and everything we do as researchers, argues Crotty (2004) – we inject a host of assumptions. Sumner and Tribe (2008) use Molteberg and Bergstrøm's argument to emphasise that any scientific enterprise is the result of underlying

assumptions, values, and beliefs that shape the problems focused on, the approaches used, and the analyses made.

Awareness of the authentic value of the researcher's involvement, as well as its restricting bias (Reason 1995: 12), will be communicated clearly throughout the research. Relational Thinking is not only a tool to examine the relationships between different people but also to ask how the researcher's relationship with the respondents influences the researcher's interpretation and analysiss of the data. The researcher's sense of connectedness and interactions over time, the context that has shaped the knowledge and understanding of respondents, and the sense of mutual respect and shared purpose are all relational factors that have a bearing on the research. This is why it is important to be honest and allow the "data to speak" and information to flow to ensure that all the "voices" can participate equally and fairly in the research process.

In terms of the researcher's bias, the researcher may share the same problem that many NGOs face, namely that they are urban, educated, and middle class. NGOs have been described as reflecting the power relations in the societies where they operate (Fowler 2013; Shivji 2007). The high levels of socio-economic, racial and gender inequalities in South Africa add layers to the complexity of the power dynamics that influence this researcher's interactions with the Trust's staff, key stakeholders and household members. The researcher is also aware that one's background influences how data is interpreted, as it is based on the different realities, interactions, shaped meanings, interpretations, power dynamics of participants and how participants relate to the researcher. Adopting a relational perspective influenced the approach on how the research was conducted to also build relational research through extensive engagements, being sensitive to how different people participate, and express different views and understandings.

Steps have been taken, as far as is possible, to minimise researcher bias and to ensure rigorous research through the use of multiple data collection and analysis techniques (as will be explicated on below). The James 1:27 Trust is interested in the findings of an open and rigorous study, and the researcher did not benefit or gain anything from the organisation through conducting this research. The Relational Proximity Framework is also useful to minimise researcher bias. It produces a report that highlights the perceptions and views of the respondents on the relationships measured. Respondents had the liberty to be honest in rating the relationships. A further attempt to minimise researcher bias was the triangulation mixed-

methods design, which included a wide range of sources such as a document analysis, mixed-method research, the human economy participant observation approach and a human development indicator framework. Since this is a qualitative and in-depth study, the same respondents were selected to assess, compare, and track consistencies and inconsistencies of respondents in the questionnaires, interviews and focus group.

4.4 Data collection, tools and analysis

The data collection, tools and analysis are discussed in more detail below. The first sub-section briefly explains the document analysis and the sources that were used from the NGO. Sub-section 4.4.2 will focus on how the Relational Proximity Framework was used quantitatively through an interpersonal relational survey. Following the quantitative research conducted, sub-section 4.4.3 will explain how the qualitative research was collected in the form of in-depth interviews, a focus group and observation research.

4.4.1 Case study document analysis

Preliminary research on the James 1:27 Trust included a document analysis of the Trust. A document analysis involves the study of existing documents, either to understand their substantive content or to illuminate deeper meanings that may be revealed through their style and coverage (De Vos 2011).

The researcher collected all the necessary sources and conversed with key people in the Trust to systematically sort through and organise the various sources. The analysis included founding documents and source documents of the organisation, historical and governance documents, financial statements, reports, policy and technical documents, public records, the website, presentations, meetings, personal documents and recordings of conversations with key people in the Trust. The document analysis, within an interpretivist tradition, helped the researcher to gain insight into the deeper and underlying thinking, philosophy and practices of the Trust. The preliminary analysis informed the interview process and further analysis of the Trust and provided an important base from which to do further quantitative and qualitative research based on a relational approach.

The document analysis had four purposes:

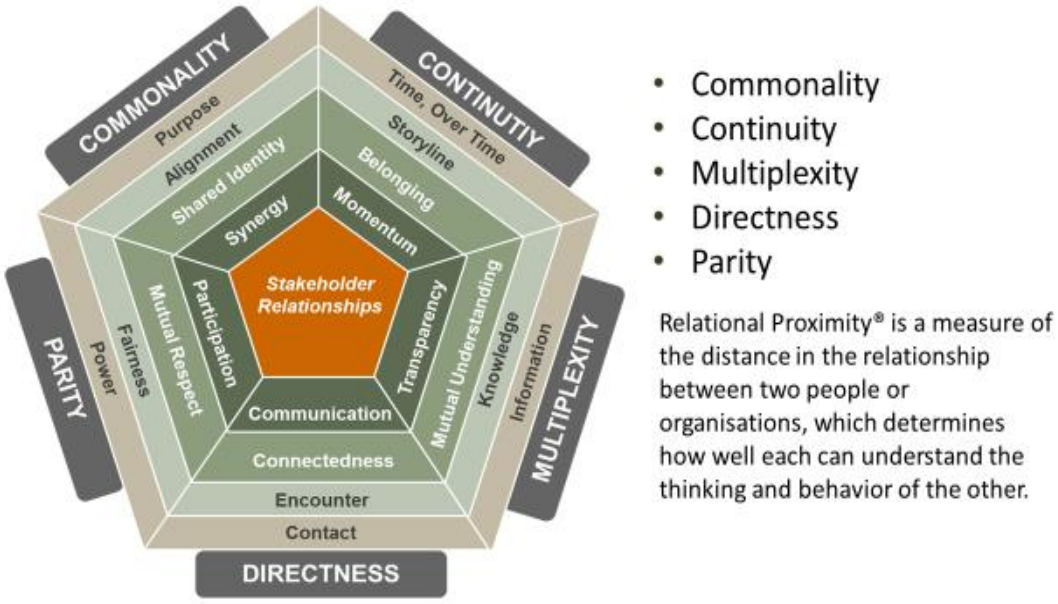
1) To provide a detailed explanation of the context of the organisation - its founding, history and practices.
2) To explain some of the key ideas and conceptualisations of the Trust, as well as how it has emerged and developed over time.
3) To examine the Care Model, thinking and language of the Trust as they relate to the broader literature in development.
4) To analyse the thinking and underlying meanings that members in the organisation attach to certain ideas, concepts and practices and to uncover the subjective experiences and interpretations of the social actors involved in the James 1:27 Trust.

4.4.2 Quantitative tool: Relational Proximity Framework

In terms of the quantitative data collection, a diagnostic tool was used to generate data for further inquiry and in-depth qualitative research. In the first phase of the fieldwork, a quantitative survey called the Relational Proximity Framework (RPF) was used to measure the interpersonal relationships and to show how key respondents relate to each other – the perceptions on proximation or distance of specific relationships.

As mentioned in chapter one and chapter three, the RPF was developed by the Jubilee Centre in Cambridge to help organisations, schools, companies and other initiatives to understand and measure stakeholder relationships more effectively. The RPF is based on five domains and drivers, as discussed in section 3.3 of the previous chapter, namely, communication (directness), time (continuity), information (multiplexity), power (parity) and purpose (commonality) (Jubilee Centre 2016). Each of these drivers is further sub-divided into four dimensions. The questions in the survey that individuals answered on their perception of the relationships with others were linked directly to these drivers and facets. This section builds on section 3.3 in chapter three to provide a more complex understanding of how the RPF works.

Figure 1: Relational Proximity Framework drivers and sub-drivers



The *Relational Proximity*® Framework – Employs 5 Drivers and 20 Sub-drivers to evaluate the relationships

(Relational Analytics 2017)

The domains are the core aspects of a relationship. Each domain has a driver of relational proximity or distance. For example, the driver of communication is "directness of a relationship". Relationships have mechanisms such as the way people make contact. How people make contact will influence the outcomes, what is achieved (such as quality and clarity of communication) and the impact (such as enabling the experience of connection).

The following Table (2) provides an overview of all the domains, drivers, mechanisms, outcomes and experiences that the survey questions measured:

Table 2: Relational Proximity Framework dimensions, drivers and facets

Domains	**Communication**	**Time**	**Knowledge**	**Power**	**Purpose**
Drivers	DIRECTNESS *Bridging the gaps: Spatial – how do we make contact?*	CONTINUITY *Bridging the gaps: Time – how are interactions linked?*	MULTIPLEXITY *Bridging the gaps: Information – what should I know?*	PARITY *Bridging the gaps: Power – how is it used?*	COMMONALITY *Bridging the gaps: Purpose – how is it aligned?*
Mechanisms	Contact *Unmediated: Quantity*	Gaps and transitions *Foundations: Duration*	Variety of sources *Breath: Variety of situations*	Use and distribution *Participation: Freedom* *Participation: Involvement*	Managing and valuing difference
	Presence *Mediated: Quality*	Story *Foundations: Perception*	Breadth and reliability *Breadth: Variety of demands*	Fairness *Fairness: Fairness of activity*	Alignment *Alignment of goals: Focus on short-term* *Alignment of goals: Focus on long-term*
Outcomes	Quality and clarity *Functionality: Quality* *Style and tone: Quality*	Momentum and growth *Anticipation: Stability* *Anticipation: Sustainability*	Understanding *Depth: Predicting* *Depth: Access*	Participation and investment *Fairness: Fairness of risks*	Motivation and synergy *Overlap: Breadth* *Overlap: Depth*
Experience	Connection *Intellectual: Connection* *Emotional: Connection*	Familiarity and reliability *Inclusion: Shared Story* *Inclusion: Roots*	Mutual appreciation *Appreciation: Knowing* *Appreciation: Being known*	Mutual respect *Mutual respect and values: Respecting* *Mutual respect and values: Being respected*	Shared identity *Unity: Synergy* *Unity: Unity*

(Relational Analytics 2017)

The drivers provide structure, and the sub-drivers provide depth. Ultimately, the questions in the questionnaire explore five aspects of people's experiences of relationships (Relationships Foundation 2019: 1):

- ***Encounter***. Firstly, consider communication in relationships and how it builds a sense of connectedness. Do the ways you communicate (face-to-face, email, text, etc.) help avoid misunderstandings and create a sense of connection?
- ***Storyline***. Secondly, consider time and the storyline in a relationship. Do the various interactions over time build a sense of momentum, growth, stability or ultimately a sense of belonging and loyalty?
- ***Knowledge***. Thirdly, consider the types of contexts that shape how we are known and our ability both to read a person and to manage a relationship. Do both of you know enough about each other to manage the relationship effectively?
- ***Fairness***. Fourthly, consider power and how it is used and experienced in relationships. Is authority used in ways that encourages participation, promote fairness and convey respect?
- ***Alignment***. Lastly, consider purpose, values and goals, and the degree to which they are shared in ways that bring synergy and motivation to a relationship. When examining the purposes of an organisation and its people, how deeply rooted are their intentions or are the two parties pulling in different directions?

The RPF has been used in various contexts and settings and is starting to generate more quantitative data to enable further analysis and inferences to be made between quality of relationships and other indicators that support people's greater well-being. Examples of studies include (Relationships Foundation 2019):

- A review of 20 local health and care systems in the UK in 2018 to understand how services are working together to meet the needs of people who move between health and care services. The question was on how well people move through the health and care system, with a particular focus on the interface. The emphasis on interface required an approach examining relationships, since that is where systems, organisations, teams and individuals relate to one another. After analysis of the data, the research links the quality of such relationships to health outcomes at a local level,

better relationships linked with less physical illness and cognitive decline and with a lower number of hospital visits and lower health costs.

- Research and data on the impact of the quality of relationships in schools in the UK and Australia have also grown significantly. In February 2017, a charity called Challenger Trust funded an expedition to Andorra for 87 students (aged 10-16) for a week of team building, skiing, and survival-type activities. The Trust commissioned the Relational Schools Foundation to evaluate the impact of the expedition on the relationships between the students and their teachers. The Relational Schools Foundation has found that nurturing positive relationships significantly improves students' personal and academic outcomes. Moreover, the successful achievement of student outcomes – including the development of positive characteristics – depends upon getting relationships right. The four years of research in Relational Schools with hundreds of thousands of lines of data and decades of supporting academic research already shows that: 1. Students who develop positive relationships with teachers achieve better educational outcomes all round, including academic outcomes; 2. Positive peer-to-peer relationships and interaction correlates well with student motivation, student engagement and academic outcomes and 3. The evidence clearly shows both the importance of effective relationships in better educational outcomes, and the fact that character developed can be measured and mapped, and that relational capability can be learned.
- The Relationships Foundation, in partnership with Suffolk and Norfolk SCITT, the Open University and Cambridge Assessment Admissions Testing, has presented the first findings from its five-year longitudinal study of the social and relational factors that affect trainee teachers' resilience and retention. Working with more than 100 trainees, researchers found that: 1. The more relationships a trainee had, the less likely they were to drop out of the training programme; 2. Both personal and professional relationships enhance resilience, but when one aspect is limited, the other can compensate; 3. Trainees with stronger and closer relationships with their personal tutors were not just more likely to complete the programme, but also to outperform their peers.

The above studies show the growing potential of measuring relationships and the data that is produced to inform decision makers in different contexts. However, most of the data produced

is still within higher-income countries. To the best of this researcher's knowledge, this is the first systematic assessment of development through a Relational Thinking lens in South Africa.

In terms of the qualitative part of this study, this research will not be able to capture relational indicators of poverty and inequality on a macro level, but will use Relational Thinking and the Relational Proximity Framework as a lens through which to view micro development (Relational Analytics 2017). The growing volume of data globally using various development indicators provide an opportunity for comparative analysis linkages and correlations, but there are also limits to the depth and insights that can be gained from large, quantitative studies such as the measures referred to in chapter three (section 3.4.2 and 3.4.3).

The dimensions and drivers of the RPF provide useful questions and indicators for analysis and are a helpful tool in providing data on how people view relationships. However, the indicators are based on very specific meanings attached to each dimension. It requires deeper questioning and analysis to reveal the underlying reasons why relationships between individuals and groups are viewed in certain ways. There are also unexplained findings, nuances and complexity that can be investigated with much more rigour through qualitative research.

This study used an interpersonal relational survey. The interpersonal survey measures the relational perceptions between individuals within or between organisations and consists of 30 questions. The respondents were identified by a stakeholder mapping exercise. Since the researcher has access to the inner workings of the Trust, it also provided a deeper understanding of the various interpersonal and organisational relations with those connected to the Trust. The Founder and CEO of the Trust were important in identifying key relationships since they have been involved in the organisation over a long period.

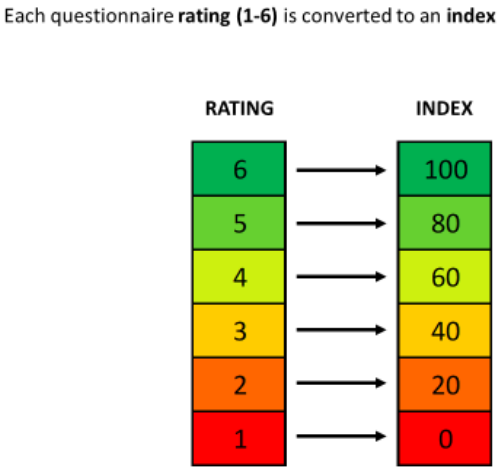
The primary focus was on the relationships of the care team of the Trust (including the Founder and social worker) with eight young adults from four households under the care of the Trust. These relationships provided deep and rich insights into a relational economy. Pseudonyms were used throughout the research analysis. The respondents will be referred to by first names since this is how they interact daily, which makes it easier to narrate the stories, interviews and conversations. The word "household" within this research refers to a group of people who live together at least four nights a week and share resources (StatsSA 2013). This smaller group lives together within a larger community but have high levels of interdependence and relational

proximity. It included household one (Lesedi); household two (Sechaba, Lebo, Tsebo); household three (Dineo, Khabane) and household four (Bheka). Lesedi, Sechaba, Dineo and Bheka are viewed as the heads of the households, which is why they were selected, but to gain more insights into the relationships, the rest of the adults were available and willing to answer the questionnaire and participate in the focus group (explained in section 4.4.3).

Relational Proximity measures the 'distance' in the relationship between people or organisations, which determines how well each is likely to engage with the thinking, emotions and behaviour of the other (Ashcroft et al. 2017). The survey is designed to capture the relational links and communicate the objectives, approach and outcomes of the survey to the respondents before running the survey. The survey poses a positive as well as a negative statement for each question with a rating from 1 (poor/negative) to 6 (good/positive). The respondents gave a rating on the scale, depending on whether they associated more closely with the negative or positive statement. The data was collected either in a digital format or respondents received a paper questionnaire. Before the respondents filled in the survey, they received a form that clearly explained the intentions of the survey, as well as the dimensions used to measure the relationships (ISUU 2013).

The scores from the survey questionnaires (rated from 1 to 6) were converted into an index value out of a hundred. The scores are converted into percentages to make it easier to analyse and interpret the results.

Figure 2: Index Values



These index values were incorporated into a grid so that the scores of all of the respondents in relation to each other were clearly visible in a colour-coded heatmap. The researcher interpreted the data using Microsoft Excel software and ensured that the data collected and processed were reviewed by a Certified Relational Practitioner and Supervisor (*see approval letter Appendix 7*). The 'heatmap' that emerges from the relational assessment that indicates the 'temperature' of the relationships. A sample of relationships across the spectrum of red, orange and green was chosen. The intent was to identify the subjective perspectives behind the quantitative score in the survey, report the findings and develop the analysis. There are numbers and pseudonyms for every person to ensure the confidentiality of all participants. The RPF "spreadsheet" with graphs and diagrams do not reveal the names of any person but provide an analysis of perceptions on the different relationships within the drivers and dimensions of the RPF.

The RPF helps to deconstruct relationships with explanatory power. It focuses on what can be observed (behavioural), how things are judged (cognitive) and what is experienced (affective). The RPF is a diagnostic survey that identifies areas of strength and weakness in relationships as well as perception gaps and is based on perceptions rather than 'big' data. The survey gives an overall assessment of the strength and quality of a relationship, identifies where the problem lies in the relationship and provides a starting point for a conversation to build the relationship. It, therefore, helps to create a better understanding of relationships and to identify the preconditions for building strong and effective relationships.

Some challenges with the RPF is that it cannot give a scientific measure of accuracy for assessment of the issues surrounding a relationship. It can also not accurately identify third-party influences or cultural forces, make people like each other or resolve problems by itself (Relational Analytics 2017). Other challenges with the survey include language barriers and different ways of interpreting and understanding the questions. The researcher tried to explain the survey, had a translator where necessary and used further questioning and follow-up interviews for clarity.

4.4.3 Qualitative tools and methods: interviews, focus group and observation

The results of the quantitative study, survey and resultant heatmap and report formed the basis for the interpretative analysis. Subsequently, the researcher conducted semi-structured

interviews, had formal and informal conversations, joined meetings and had a focus group with those who had completed the survey to explore the weak and strong relational proximity and gain a deeper understanding of the participants' responses, reflections and perceptions of the results (ISUU 2013).

The semi-structured interviews included one or two household members from three households under the care of the Trust that were selected for the study. These household members were identified by the households and the Trust as people who were regarded as either the head of the household or people who carry some responsibility for the household. The Founder of the Trust was also interviewed. As part of embedded research (discussed in the following section) and gaining more understanding of the Trust, informal meetings were also held with the CEO and social worker of the Trust. There were also meetings with various other members and stakeholders of the Trust throughout the research process (see Appendix 4).

The themes explored in the interview guide and focus group were based on:
(a) The five domains, drivers and dimensions of Relational Thinking, including the thick descriptions of RT as described in the previous chapter.
(b) A human economy approach to study people's engagements and what people do in their day-to-day lives.

The advantage of semi-structured interviews and a focus group is that it provides a general structure for the research questions of the study but is also flexible. Semi-structured interviews and focus groups are qualitative methods of inquiry that combine open or prompting questions with themes which were explored in the research (Saunders et al. 2016). The researcher had a guide and framework with the key themes and objectives of the study but allowed deviations to occur as long as the topical trajectories remained broadly within the framework.

The semi-structured interviews can be time-consuming when collecting and analysing the data. It also requires the necessary skills from the interviewer to ask questions, initiate prompts and respond appropriately to participants. It requires carefully planned preparation to ensure that questions are not prescriptive or leading, and the researcher must be clear about the "roadmap" and objectives to generate rich responses from participants (Cohen 2006). When the researcher is well prepared and well equipped, semi-structured interviews can be valuable because they allow participants the freedom to express their views in their own terms and from their contexts,

while encouraging two-way communication between the researcher and the participant as an extension of the research (Laforest 2009). The researcher can also observe what participants are doing, which makes the "openness" of semi-structured interviews useful within the broader framework and themes of the study. Semi-structured interviews can assist the researcher in what is already known, but it is also an opportunity for learning and a deeper understanding of the participants and their contexts (Leech 2002). This study made use of face-to-face interviews. The interviews conducted were in a neutral environment where participants felt comfortable, except for the times when the researcher spent time at the office of the Trust and at the homes of the household members.

Face-to-face interviews were a preferred option (to, for example, telephonic interviews) as one of the best forms of data collection, as they minimise nonresponse and maximise the quality of the data collected. Face-to-face interviews allow for in-depth data collection and comprehensive understanding of what participants say, also through their body language and facial expressions. The interviewer can also probe for explanations of responses, and thus the interviews can be considerably longer (Dörnyei 2007). The researcher spent time at the Trust and with the household members to explore underlying meanings to uncover the subjective experiences and interpretations of the social actors involved in the James 1:27 Trust, which makes the face-to-face and open-ended interviews necessary.

Additionally, a qualified coach facilitated a focus group session between staff members of the James 1:27 Trust secretariat and a selection of the household members of the Trust. The researcher is too involved and well known within the Trust to lead a facilitated discussion between the secretariat and household members of the Trust, which is why an independent and skilled facilitator seemed appropriate to facilitate the focus group. Together with the facilitator, the researcher designed the focus group discussion around the key relational themes of Relational Thinking with specific objectives and outcomes while ensuring flexibility for other relevant information and insights. The researcher was present but did not participate during the focus group and only observed and took notes. There were ten participants in total, including three staff members from the Trust (the Founder, CEO and social worker) and seven household members from three households under the care of the Trust. The focus group was conducted on 15 March 2019 at the Innovation Hub in Pretoria and took six hours.

The focus group was divided into the following sessions:

- Session 1 was a historical overview of the Trust from the perspective of Trust staff. It included the Trust's view on the phases of the development of the organisation. Afterwards, household members could ask questions, comment and share from their viewpoint how they understand and view these developments.
- Session 2 continued to build on Session 1 by talking through the key lessons learnt as an organisation from the various phases (positive and negative lessons).
- During Session 3, the facilitator asked all the participants (in Trust household mixed groups) to sketch what the Trust represents to them as a group. The idea was to use metaphors to tap into how participants subjectively pictured the Trust.
- Session 4 was a feedback session on the RPF results of the five Relational drivers. It was a very broad overview providing the overall scores of the Trust household relationships. The drivers were workshopped further to get an overall sense of how the group interpreted the relational indicators in a group setting.

The interviews and focus group were recorded when consent was given by respondents to do so. Recordings are useful in providing and capturing an accurate summary and details of the interview to minimise biases, especially from the researcher. There are also other advantages to recording the interviews. The researcher can listen to the recordings repeatedly to get clarity on the interview tone, pitch, speed and direct quotes (Saunders et al. 2016). It gives the interviewer the time to capture notes on nonverbal and underlying responses and gives the researcher time to concentrate on questioning as well as listening to the participant (Neuman 2006).

Together with the above mixed-method approach, the human economy approach forms part of the research. It is primarily influenced by anthropology, which tends to use participant observation as a research method. Participant observation often entails close and intimate familiarity with a given group of individuals and their practices through extensive involvement in their environment over an extended period. Methods include interviews, observation, participation, collective discussions, analyses of personal documents in the groups, self-analysis, results from activities and life histories. Participant observation is a research strategy to research the phenomenon within the context in which it occurs with data collection techniques that do not oversimplify the complexities of everyday life (Saunders et al. 2016). As a volunteer at the Trust since 2015, the researcher has access to the workings of the

organisation that offers insight, technical knowledge, research background and personal experience for a much deeper understanding of the organisation.

The previous chapter explained different measurements of development with a specific focus on understanding and addressing poverty and inequality. The human development paradigm offered an important shift towards more holistic measurements of development, as was discussed in section 3.5. Drawing on the human development paradigm as discussed in section 3.4.2, the researcher collected data using the Multidimensional Poverty Index (MPI). The heads of households or a responsible adult in a household was interviewed on the standards of living, health, education and income of the household. Additionally, the researcher added questions on who respondents view as part of their support structures (see Appendix 6). The MPI was chosen since it is known and used internationally and serves as a baseline and way to compare the Trust's households' MPI with households in a similar context. This will by no means provide the levels of accuracy required to be representative of the wider population, but it is used to determine whether there are any differences between Trust household members and other households in the same community from a human development perspective.

The household members live in the same area or with similar conditions and contexts. The following households were selected and interviewed:

- Trust households. These includes three heads of households or a responsible adult in each household. The heads of households interviewed were referred to as household 1, 2 and 3. These are the same households than those from the five households in the quantitative study (in total, 29 members from different households).
- Non-intervention households (also referred to it as "non-intervention" group in the analysis). These include three heads of households or a responsible adult from the same area as the Trust households, but without interventions from an organisation. The heads of households interviewed were referred to as household 5, 6 and 7 (in total, 20 from different households).

Part of the analysis included comparisons between the responses from both the quantitative and qualitative data of respondents. Analytical aids that were used included summaries of observations, shorthand notes, personal memos to capture ideas as the process evolves, and a

diary to record events or issues. The notes were organised on a spreadsheet with the respondents' unique identifiers and categorised according to the different participants. The questions and summaries of responses were included in separate columns, themes and sub-categories with a column with comments on observations from the researcher during the interviewing process. Once transcribed, the researcher reviewed the data to identify common, recurrent and emerging themes in line with the objectives of the study and the conceptual framework. The researcher was careful not to draw unwarranted inferences due to the small size of the sample. Instead, approaches, tools, models and principles were suggested based on the results for further support, testing and comparisons in subsequent research.

The data collected in line with Relational Thinking and the Relational Proximity Framework provided a rich and useful framework and lens for further coding and analysis as it relates to the main objectives of the research (Charmaz 2003). Thematic content analysis was used to interpret and analyse data collected during fieldwork. Thematic content analysis is a tool for analysis that provides a descriptive presentation of qualitative data sets. The qualitative data sets are analysed by identifying the recurring patterns in data and grouping them into themes. These themes are patterns of thought that capture the perceptions of research participants on various phenomena in relation to the research questions (Yin 2016).

Thematic coding supported the inductive analysis of this study by providing a flexible process to identify analytical themes from the data. As the researcher worked through the notes, analytical categories and themes were pulled from the data to explore how these themes fit together and how they inform a relational economy model in development. Literature on theories, research and supporting evidence were used throughout to deepen the analysis as the themes emerged. Questions on the research notes included "what is this?" and "what does it represent?" (Gibbs 2007). The data was broken down, examined, labelled, conceptualised and categorised into themes that were discovered and developed within the broader objectives of the study. An important part of conducting research as discussed so far in this chapter is the ethical considerations. This will be explained in the following section.

4.5 Ethical considerations

Ethical considerations, according to Saunders et al. (2016), relate to gaining access to information from the target sample and explaining why the data is needed for the study. The

section below explains how access to the data was obtained and the possible ethical concerns regarding the conduct of the entire research project. The ethical concerns include the researcher accessing the inner workings of the Trust, as well as the networks and links of the Trust. Consequently, the close relations that the researcher has with the staff and household members of the Trust and some of the other stakeholders posed risks as to how the researcher selected and conducted the interviews. The understanding of the researcher's role in the organisation, therefore, requires clarity and explanation to address some of the ethical concerns.

Important steps were taken to minimise these risks. The first is a clear understanding of what embedded research is and how to navigate the researcher's own familiarity with and understanding of members in the organisation. Embedded research is used in several disciplines such as anthropology, social policy and social work, in health studies and various others (McGinity & Salokangas 2014). The literature explains embedded research as a researcher's affiliation with an academic institution as well as an organisation outside of academia ("in-between-ness"). The researcher develops relationships with staff and is seen as part of the team. The researcher generates knowledge in conjunction with local teams (co-produced) which responds to the needs of the host organisation. The researcher builds research capacity in the host organisation (McGinity & Salokangas 2014; Vindrola-Padros et al. 2017; Walley et al. 2018).

The researcher's relationship with the organisation allowed much greater openness and trust with tacit knowledge of the organisation. However, the embedded researcher needs to consider the experiences and points of view of the different subgroups within the organisation. The collaborative relationship with the Trust and the co-production of knowledge was enriched by practicing "reflexivity" – the researcher's reflection as an individual and as part of the organisational context. Clear guidelines between the embedded researcher and the Trust helped to guide and manage expectations. A strong link with the University of Pretoria as the academic institution was maintained by the researcher to preserve a critical perspective (Cheetham et al 2018; Vindrola-Padros 2017). Where the researcher seemed too involved and well known in the Trust to be viewed as "objective", precautionary measures were taken, such as using an independent and skilled facilitator to facilitate the focus group, instead of the researcher.

Further steps to manage ethical risks between the Trust and the researcher include (Cheetham et al 2018):

- Clear communication on the focus and function of the researcher's role and its limits.
- Discussions on the organisational culture and values of the Trust for research and evaluation, as open and reflexive, welcoming new insights and reflections on different ways of working.
- Discussions on expectations of being physically based with the team, having a desk, access to IT systems, admin support, and availability of meeting rooms as needed.
- Attendance at team meetings, and other staff meetings to explain the researcher's role, promote engagement, answer questions, allay fears and anxieties, explore and utilise opportunities for co-production.
- Informal contact with stakeholders to enable colleagues to get to know the researcher.
- Opportunities to explain the ethical approval process and what it means in practice and being seen to adhere to its principles.
- Recognition that people may have preconceived ideas and anxieties about the researcher.
- The researcher communicated and acknowledged that colleagues may feel threatened or at risk of being scrutinised.
- Feedback of early thoughts and reflections offered useful opportunities to explain the researcher's role, to build trust, feed in observations and understandings, and validated findings.

The research will also be used further to jointly discuss with the organisations the implications of the findings.

The researcher also disclosed to participants that there were no financial or other benefits to the researcher or the Trust and explained that the research did not form part of the researcher's responsibilities as a Trust member. None of the parties involved in the research (including the researcher, participants, the James 1:27 Trust, the James Social and Ethics Consultancy and Relational Analytics) received any financial or other benefits from this research. The researcher was not involved in operational decisions for the duration of this study and this was included in discussions on expectations between the Trust and the researcher at the start of the study[4].

[4] The researcher's profile and details appear on the Trust's official website, but the researcher was not involved operationally in any decision making in the organisation during the time of the research.

Communication on the part of the researcher is crucial. However, it depends on the nature of the study and how transparent the researcher should be to attain the results required for analysis of the data (Bailey 2008). For the purposes of this study, the researcher introduced and explained the research to all respondents and clarified that they can consent or decline their involvement in the study. The interviews started only after respondents signed the consent form. Participation can be encouraged if the researcher can show how the study can be an opportunity for reflection for the organisation and its stakeholders. The researcher conveyed the value of being open and honest to ensure results that can help the organisation in the future and assured safeguarding the confidentiality and anonymity of all those involved in the research (Saunders et al. 2016: 220).

Other important measures to ensure that the research is not compromised due to negligence from the researcher (Neuman 2006 and Silverman 2004):

- Respondents should be able to concede, refuse or withdraw from the study at any time.
- Respondents must give signed consent to interviews and recordings after the researcher has clearly explained the process.
- Respondents' confidentiality must be guaranteed by the researcher.

The informed consent form included that respondents are aware of their participation in the study. The objectives and the process of the research were explained to all respondents, as well as the potential risks and benefits of the study. It assured respondents that the research is voluntary, and they can withdraw at any time without consequences should they decide to do that. The participants were free to ask questions and the information will be made available to them. The recording of the interviews was also explained to the participants, and the interviews were only recorded when respondents gave their consent. All the above required consent by the respondents before the further questions were asked and research conducted.

4.6 Conclusion

This chapter presented the methodology that guided the data collection process of the research study. This research used an interpretivist approach, and a case study method was adopted to gain deeper knowledge about the South African NGO James 1:27 Trust. The case study method was adopted in this research to gain a more in-depth understanding about the experiences,

meanings and interpretations of the organisation under study in relation to the research questions.

The study used a mixed-method approach by utilising both quantitative and qualitative research methods to yield more complete and varied evidence. This allows for greater depth and breadth, and corroborating the findings. The mixed-method approach included a document analysis of the James 1:27 Trust to gain a deeper understanding of the thinking, concepts and practices of the organisation. This was followed by the Relational Proximity Framework, which is a questionnaire that produces quantitative data on the views of "proximity" or "distance" between different individuals or groups. The James 1:27 Trust members were asked to complete the questionnaires on their relationship with other parties in the organisation. The data from the questionnaires informed further semi-structured interviews and a focus group between Trust staff and Trust household members. The qualitative research included 12 participants who either responded to the interviews or participated in the focus group, or both. The research also used the Multidimensional Poverty Index (MPI), which is an important index within human development that measures standards of living, education and health of people. The MPI compared the human development of Trust households with other households in a similar area who do not receive support from any organisations. The findings from the MPI revealed limits to using human development indicators, since it is blind to relational issues, which require different questions that the development enterprise has not yet asked.

The researcher has been involved in the organisation since 2015 and has used this involvement together with relational questionnaires, semi-structured in-depth interviews, a focus group discussion and participant observation as research techniques to draw on the meanings and experiences of the research participants. This approach allowed for the collecting of rich information and data that provide insights into understanding the extent to which relationships between people are indispensable to development and to explore what the deeper knowledge from the data suggest about a relational economy.

The use of multiple research techniques (document analysis, surveys, semi-structured in-depth interviews, participant observation and a focus group) corroborated the findings of this study in the exploration of Relational Thinking as a research method in development studies and practice. The unique contribution of this study is evidence-based findings on the relational experiences and perceptions between people in the development sector and how they shape our

understanding of development. These findings are presented in the following chapters, beginning with an overview of the James 1:27 Trust and a critical analysis of the concepts, language and terminology used in the organisation.

CHAPTER 5: IN SEARCH FOR LEGITIMACY OF DEVELOPMENT CONCEPTS

5.1 Introduction

This research has thus far navigated the existing literature on development discourses through a relational economy lens. The purpose of such an examination was to find the gains and gaps in the existing literature. It is evident from the literature review that a more accurate understanding of the relationships between people and groups is central to understanding development. Social and economic realities do not occur in a vacuum. They take place in the context of human relationships, which is why any meaningful understanding of social and economic spaces require a relational frame of analysis.

Development, especially from the 1950s, was typically about material and economic growth. We now realise that perpetual growth is unsustainable, and development needs to consider well-being as the quality of human-to-human and human-to-ecosystem interactions. Deeper relational understanding between individuals, groups, organisations, systems and different contexts is needed to further examine some of the underlying practices, processes and behaviours of relationships for any meaningful development to take place.

This chapter and the next are based on the primary research of this study (including relational questionnaires and further qualitative research) to examine some of the relationships in the James 1:27 Trust through Relational Thinking and the Relational Proximity Framework. To gain such an understanding, the domains of the Relational Proximity Framework, namely, communication, time, information, power and purpose of relationships, are particularly helpful.

The James 1:27 Trust was established in 2004 to respond to the HIV/AIDS crisis in South Africa in the early 2000s. Over the years, the organisation has conceptually and practically developed ideas and systems for the holistic care of children and youth in the country. Through the Trust's Life Cycle Approach (in section 5.3.1 of this chapter) it has supported the holistic development of a small group of child-headed households as a result of the AIDS epidemic. The organisation also aims to develop systems that will pave the way for large-scale holistic care to children and youth as part of the idea of a care economy.

Part of the Trust's thinking includes terms such as Social Change Theory, Life Cycle Approach, Virtual Adoption and the Social Market. The chapter will explain the meanings of these terms and how they are understood by the organisation. After explaining the vision of the Trust and how it intends to develop and achieve its mission, sub-section 5.3.3 will critically analyse the terms and concepts of the Trust. The Trust uses language and concepts that are also widely used in development theories and practice, in business and in capitalist environments.

The analysis will point out the "blind spots" that often accompany the use of terms and concepts in the NGO and development sector. Similarly, the measurements that are used in human development are also blind to relational issues in development. The final section of this chapter will present the findings of the Multidimensional Poverty Index (as explained in section 4.4.3). It reveals the similarities and differences between Trust households and "non-intervention" households in terms of human development, but when the relational indicators are explored in chapter six, it raises important relational questions that have been ignored by development philosophies, measures and interventions.

Such an analysis views the economy and society as embedded within complex systems of relationships. It also recognises the value of the dialectic between the individual and the collective. Which is to say that individuals are deeply connected with each other in ways that are more fundamental than historical discourses of development acknowledge. In this chapter, the researcher uses the founding, development and continuum of the Trust to critically analyse some of the development concepts used by the organisation. An overview of the Trust's ideas and practices serve to create the context for more in-depth analysis of the relationships in the following chapter.

5.2 An overview of the James 1:27 Trust as part of the social economy

The James 1:27 Trust claims to have practices, ideas and conceptualisations that include developing a relational and care economy to address issues such as poverty and inequality in South Africa. The thinking and ideas of the organisation can be situated within the literature on "social" and "solidarity" economy, even though these terms are still developing and the distinction between them is not entirely clear, as was explained in section 3.3 of chapter three.

The Trust is an NGO but also views itself as a "social enterprise" (using business innovation strategically for social benefit), which fits in particularly well with the idea of a social economy. The Trust was located at a Science Park at the Innovation Hub in Pretoria (from 2005-2019), South Africa, where both small and large businesses are also located. This exposure has shaped the Trust's thinking, in business terms, around innovation as "… new ideas that become commercialised and then scaled if they are viable and sustainable", as one of their strategic perspective documents (2015a) indicate. The Trust has spent years on its "proof of concept" by working with and caring for a small group of households to demonstrate the feasibility of the concept design of holistic development within a Life Cycle Approach, as will be explained later in the chapter.

At a glance, the Trust is a faith-based organisation. The mandate of the organisation comes from the Christian Bible, the New Testament book of James, chapter 1, verse 27: "*Pure and genuine religion in the sight of God the Father means caring for orphans and widows in their distress and refusing to let the world corrupt you*" (New Living Translation).

The vision of the organisation, as stated in a PowerPoint presentation of the Trust and on their website, speaks to a relational response to caring for children and youth:

> We dream of a society that cares for every person … This philosophy of care, integrity and engagement is at the heart of all we do. We were born in 2004 with the dream of no child being left without care. We create systems that empower organisations who care for vulnerable children and youth and connect them with a global community of donors who want to care (James 1:27 Trust 2018).

The core values of the Trust contain and carry many relational aspects that drive the culture and workings of the organisation within a very broad spectrum of Christian traditions shaped by the movement and change of people in the organisation throughout the years. The below reflection by the Founder (29/03/2019 interview) on the work of the Trust gives some insights into the guiding ideology and approach of the organisation:

> "… Then we move into the transformational space, which begins with acceptance… It is the contemplative practice of being present, listening, questioning, having compassion and then standing in solidarity… You have Christ within us and Christ

> between us and allowing for that. But within that comes compassion, which is allowing your heart to be broken by the things that breaks God's heart… It is a very unglamorous acceptance of suffering. It is the reality that we are going to suffer because of the relationships we are engaging in… But if we are in community, then that suffering flows into the Cross... Suffering then finds expression and meaning, it positions us for solidarity where we then stand in the place of justice against injustice... I am then transformed in the situation that I have accepted. Embedded in this philosophy is Ghandi's idea of 'you have to become the transformation that you want to see'… Ethically you have to confront many of your own issues and many of the things that make for us being quite selfish, individualistic, materialistic, and greedy… Which also means that the culture of the Trust has had to change – how we work, relate and how we approach what we are doing."

In the PowerPoint presentation of the Trust (2018), they state that the Trust believes in "transforming, redeeming and reconciling all things in love" and relationally "striving for a just society which values and respect everyone's contribution to our common humanity". Other values presented by the Trust that speak to relationships are integrity, "to be authentic, consistent and trustworthy in all our dealings"; commitment, "we have the responsibility to create the world we want to live in, regardless of the difficulties and sacrifices involved"; and care, "we believe that no one should be left behind…". These values inform the Trust's vision to "empower care" through an integrative system of services to connect and care in ways that are holistic and intentional about building a relational society.

The founding of the James 1:27 Trust dates back to 1999, when the Founder of the Trust was a diplomat and first secretary at the South African Embassy in Paris. One of his responsibilities was bilateral cooperation in the field of Health and Social Development, specifically focusing on AIDS-related issues. The Founder was sent to Paris while in remission for acute myeloid leukaemia, a form of bone marrow cancer, which influenced his commitment to his work in Paris. He later reflects that his life was spared as a result of faith, good diagnostics, advanced treatment and a support network that many people do not have. He developed a deep compassion and commitment to contribute to the struggle against HIV/AIDS and to use his role as a diplomat to make a difference. He did not experience any stigma as a cancer sufferer but realised that this was not the same for those who were dying of AIDS-related illnesses. The Founder also questioned how South Africa could cope with the crisis of HIV/AIDS and the

thousands of children who have been affected by and orphaned as a result (in the Founder's Masters Dissertation 2010). Over the years, the Trust has developed concepts and systems in response to the crisis of HIV/AIDS and other social issues.

The Trust's approach to care forms part of holistic development as a long-term investment in a child's development (including food and nutrition, shelter and care, protection, health, psychosocial development, spiritual well-being, education and skills training). The Trust views holistic development as a complex but coordinated process of multidisciplinary interventions. In a source document of the compiled history and overview of the organisation (2019), the approach is explained as,

> "First, the assessment is the identification phase that consists of various processes and documents, such as the intake interview, the child's school reports, police records and statutory files. Second is the intervention, which includes the planning and the discussions of what are we going to do. Third is the implementation, which includes the monitoring and evaluation of tasks and activities, within a managed system of accountability and responsibility, with designated roles and a process of who does what, when and how. The evaluation phase therefore includes the processes where we look at the impact and efficiency of our intervention and we redesign our interventions if necessary. We provide the entire family with a care plan where the child is located in the care plan, and this care plan is therefore located within a broader context of the community – emphasising that we cannot care for a child without caring for the family and we cannot care for the family without caring for the community."

Practically, the Trust offers James Integrated Services (on their website and 2018 PowerPoint presentation), which include,

> "1) James Agency financial management and reporting services. It is built on Sage Accounting, and enables client organisations to track income and expenses according to project, dimension of care, or beneficiary. 2) James Care encompasses the care support services offered to client organisations. It includes care information management and reporting, as well as care methodologies and processes. 3) James Connect is the sponsor relationship management system of the Trust. It includes functionality for signing up new sponsors, processing donations, and managing the communications and reporting with sponsors … and link those payments to the client

organisation and project, care domain or beneficiary family as selected by the sponsor."

This following section will review the concepts, ideas and particularly the language used by the Trust to "weigh" it on the scale of "relational thinking". As argued throughout this thesis, development should not be understood only in terms of the individual or collective but should also be measured according to the health of relationships between individuals and groups within society. The research uses Relational Thinking language to define healthy relationships as the sense of connection between individuals and groups, a shared story, roots and reliability in the relationship, mutual appreciation, understanding and predictability, mutual respect and fairness in the relationship and a shared identity, unity and purpose in the relationship (Relational Analytics 2017). An awareness of different concepts and language that focus on the relationships between groups and people become instruments through which to analyse how the Trust uses concepts and language as part of their care and development model.

5.3 In search for legitimacy within nebulous development concepts

Over time, the Trust has developed and adopted language and concepts as part of their development response to communicate their particular approach to care. Concepts carry specific meaning and cannot be used without critically analysing their baggage or pitfalls. As already discussed in chapter three, by and large, the development enterprise is trapped in formulas, policies and practices unable to address development issues in any meaningful way. Chapter three pointed out that discursive framings affect what happens on the ground, given that terms are "loaded" with assumptions and implied standards (Cornwall & Brock 2005). If terminology and "buzzwords" in development are created and sustained by development agencies, as argued by Cornwall and Brock (2005), then these words facilitate a multiplicity of contingent, situational and relational meanings.

From a relational perspective, the words people have important implications for the meanings communicated, how these meanings are communicated and the extent to which these meanings create a sense of connection and belonging. Moreover, it matters to the extent in which the meanings encourage participation, promote fairness, convey respect, and how these are shared by all those affected by the terms and meanings attached to them (Ashcroft et al. 2017). The words used can inform and impact the reality of people's expectations, and the words used to

describe individuals, groups or organisations can define relationships and the expectations placed on those relationships (Shevell 2009).

The following sub-sections will examine the language and terms used by the Trust as well as conceptualisations developed over time to raise more in-depth questions about how these terms are used and what meanings are attached to the terminology. Sub-sections 5.3.1 and 5.3.2 will focus on the mission statement of the Trust ("why they care") and on how the Trust aims to fulfil its mission statement by "empowering" care through a Life Cycle Approach and Social Market. The final sub-section will examine the meanings and language attached to these concepts used by the Trust by locating them within the broader literature critique on language and terminology of development.

5.3.1 Mission statement and response of the James 1:27 Trust

On the Trust's website, the mission statement of the Trust is described as: "Empowering care for orphans, vulnerable children and youth". The reasons why the Trust chooses to care is firstly as mandate (as explained in section 5.2 of this chapter) and secondly, because of the scale of the problem of HIV/AIDS and other social issues. During the Founder's time in France in the early 2000s, he spent time with a diverse group of people who were part of the anti-apartheid movement and learnt from their experiences in social justice. Two to three years were spent on investigating the leading French NGOs working in Africa and Europe with children at risk, HIV/AIDS, poverty, and other related issues. The Founder (29/03/2019) comments,

> "In our research, we saw that NGOs don't really make a difference in the children's lives, there is no differential where NGOs are working or not working. The reason for that is that they take the care and spread it like butter, so thin, it has no impact. We can't just do 'mielie meal and sardines', it's a very complex package of development needs and care."

The Trust decided to start its own Care Programme to learn what it means and what is required to practice "holistic" care. The following is included within the Care Programme of the Trust:

> "The Trust currently provides care to 28 beneficiaries in 5 families, and indirect support through community partnerships. The Care Programme enables the Trust to have a

> direct impact on the lives of some of the most vulnerable members of society. It also provides a context in which to develop and test models of care that have a measurable impact, and is the first client for our integrated service offering" (source document on compiled history and overview of the James 1:27 Trust 2019).

The Trust started and continued with a small number of households as part of their Care Programme. The Trust defines "family" not ideologically, but contextually as a construct of a smaller group of people within a larger community who are interdependent and with high levels of relational proximity. They believe in "holistic family-based care" and keeping children in their homes instead of being institutionalised. The Trust model uses the idea of extended family beyond communities to create a care economy and relational society through extending care. In a note from the Founder (17/12/2017) he explains:

> "At the heart of holistic care is the belief that a nation's soul and character is measured by the way in which it cares for the marginalised and the vulnerable. Human rights and citizen responsibility while best served by constitutional democracy finds expression in a welfare safety net. Traditionally this is done by the state, but the problem is that it just feeds dependency and entitlement because it is care without relational proximity. It is political patronage that just increases state debt because of the inherent inefficiencies. The Trust's vision and indeed mandate is to care through the mechanism of 'virtual adoption'. Care is embedded not in welfare but in family, extended family and by extension nation-building."

Embedded in the Care Programme is the Trust's Social Change Theory and Life Cycle Approach. The Social Change Theory of the Trust is based on the imagery of *the dream, the dance* and *the choice*. There is a *dream* for every child's life, for the family, community and country, but close to the dream is the nightmare. To respond to the dream and manage the nightmare, the *dance* is a set of interventions and evidence-based indicators between caregivers and households to measure where a child is, where they want to go and what the route map is. The idea is to create relational proximity between caregivers and those in need of care where there is love, acceptance, affirmation, validation, recognition, mutuality, a sense of dignity, worth and value. Ultimately, each child, person and family make *choices* along the journey that either contribute towards the dream or feed the nightmare (source document on compiled history and overview of the James 1:27 Trust 2019).

The Life Cycle is a concept that the Trust uses to view the care of a child on a "spectrum of 'extreme vulnerability' towards participating in building resilience through building blocks such as emotional care, social and psychological, physical, spiritual, cognitive and educational care" (source document on compiled history and overview of the James 1:27 Trust 2019).

Embedded in the Trust's Life Cycle Approach is the United Nations Conventions on the Rights of the Child and the Child Status Index. After conducting extensive research on various care plans, the Trust compared and incorporated domains and indicators in the standardised USAID Child Status Index (CSI) (2009). The CSI is a tool to identify the needs of children and create care plans to monitor the well-being of children and households in its Care Programme. It is a tool that can be used in assessing and tracking "priority services" to a "vulnerable" child and household, as well as for an initial assessment and follow-up monitoring. Section 3.6 of chapter three raised concerns about using instruments that are still largely biased in favour of "Western" norms and standards. The Trust locates its care within the framework of UNCRC, which is inherently individualistic and based on rights without a strong enough focus on responsibilities or the idea that persons are inherently embedded in and constituted of social relationships. Despite the Trust's use of UNCRC standards and the CSI as an instrument to care, they also locate their philosophy of care in the idea of an African "village" which represents community life. This will be explained in more detail in the following section.

The Life Cycle Approach includes five stages or gates of development, including 1) emergency relief, 2) rehabilitation, 3) development, 4) independence/autonomy and 5) reciprocity (James 1:27 Trust 2019). The Trust does not have an "exit strategy", and household members under the care of the Trust are always part of the "Trust family" unless they choose to break contact with the organisation. Due to the small group of households under the organisation's care, the Trust gives individual attention to household members and has built a financial system that can support both a household and the individuals within a household.

In the Life Cycle Approach, there is both a transactional and transformational component. The Trust's transactional component resonates with the literature (as discussed in section 3.4.1 of chapter three) on a structural (economic) perspective on empowerment – what is or should be transferred to achieve certain goals and what are the outcomes of the transfer (Weidenstedt 2016: 8)? Further questions can be raised on who decides what the outcomes are and if they have been successful – is it the "giver" or the "receiver"?

The Trust's transactional component focuses on the relationships between the Trust as "givers" of resources and household members as "receivers" of resources, but with stipulated conditions for both parties. The Founder (29/03/2019 interview) describes the transaction as,

> "… an exchange and social contract with conditions: what do I give and what do I get, and how can I maintain integrity in that? It includes rules of engagement, dispute mechanisms where you allow for negotiations and conflict because interests are not always the same…"

The conditions are also influenced by other relationships, especially sponsors who support the care of household members. The Founder (16/03/2019 focus group) explains that the sponsor money is also conditional:

> "So, the money we get is not donor funding... it's actually money given as an expression of care by sponsors. They give their money under certain conditions. They give it because they trust our judgement, and they know we are not going to give it to a family, and they can go to the bottle store and use the money. The money must be used for certain prescribed purposes. So, there are limits, and those limits is where the boundaries are, and those boundaries is where it creates stress."

The Trust's willingness to acknowledge and deal with stress and conflict in the relationships between "giver" and "receiver" is what makes this NGO different from most and makes their approach relational. The Trust also recognises the need to negotiate care as a process of learning and understanding different interests instead of claiming to have the answers as caregivers and professionals. These are emerging themes which will be examined in more detail in chapter six.

In addition to the transaction, the Trust's transformational component focuses on the relationships between the Trust and household members. The Trust views the relationship as the critical bridge between transactions and the difficult choices (made by both household members and the caregivers or care organisations). The choices are made having limited resources and capacity as well as conflicting interests and disputes that should be carefully managed. The transformational component is also embedded in the values of the Trust and

includes “being present, listening, questioning, having compassion and then standing in solidarity…” (Founder interview 29/03/2019).

The intention of the Trust’s Care Programme within a Life Cycle Approach has always been to, firstly, learn what is required to “care holistically” and, secondly, develop systems to enable other care-based organisations to care in this way. The Life Cycle is a system in which the care of an individual and household can be tracked over time as part of a holistic care model within James Integrated Services. The services provided to households and their members should support a child through a “Life Cycle” of care to assist a child not only to a point where they are independent or autonomous (in the sense that they can care for themselves and their dependents), but also to reciprocity, where they want to give back to others. The Trust believes that these last two stages are important, since the child as a young adult must reach levels where they are independent of continuing support and in a position to give back to others in society.

As part of the Trust’s “empowering care”, they aim to find a “scalable”, “big and bold” response to care with interventions that are “evidence-based and carefully managed” (James 1:27 Trust 2018 PowerPoint presentation) due to the scale of the problem of HIV/AIDS, poverties, inequality and unemployment in South Africa. The understanding of empowerment as the transference of resources is evident in the Trust’s objective,

> “The Trust’s objective is to scale the quality and reach of care to orphans and vulnerable children, and the primary mechanism for doing this is by providing an integrated set of services to community-based care organisations. These services assist with the management and reporting of the finances, care, and sponsor relationships of client organisations. The services are designed to integrate with one another so that the whole is greater than the sum of the parts (James 1:27 Trust 2018 PowerPoint presentation).”

Part of the Life Cycle Approach is to use resources that are already in communities. The Trust decided to use Asset-Based Community Development (ABCD) as an approach. ABCD is a people-centred approach, built on Kretzmann and McKnight’s (1993) work, arguing that it is critical for communities to take responsibility and ownership for their own developmental needs and welfare. The idea is to “empower local communities” through harnessing local assets and resources of a community. An ABCD approach includes focusing on a community’s strengths and assets rather than its needs and problems, identifying and mobilising individual

and community assets, skills and passions. ABCD for the Trust is linked closely with "holistic care" of households since a community's development is important for household development in communities.

In an interview with the Founder (29/03/2019), ABCD was explained as,

> "The approach does not promote a 'we are going to fix it' or 'we have the solution', but it is a more humble, less patronising and realistic approach of aiming to go into communities as partners and collaborators, to look for the assets that are present in the community and mobilising them to address the obstacles that are present in the communities. In this model, we go on to looking at the resources the family has at their disposal, the issues of resilience that are identifiable in the family and we affirm what is good and acknowledge the strengths in the family. We also undergo a sensitive process of 'family love', where we assure the families that we are in this with them, and we won't reject them."

Part of "empowering care" for the Trust is to "transfer capitals from the resourced in society to the poor" (source document on the James 1:27 Trust strategic perspective 2015). A major question for the organisation is how to shift "capitals" (such as social, human, spiritual, technological and financial) to care for children, households and communities. The Trust views the term inequity in relational terms as speaking to "relational deficit and distorted parity" (Founder note 17/12/2017).

The above discussion on how the Trust view care and "empowerment" can be linked to their bigger vision of "scaling" care through ideas of virtual adoption and a social market, which will be examined in more detail in the following section.

5.3.2 Virtual adoption and the social market: large-scale care and a funding model

The Trust uses the concept of "virtual adoption" based on the popular African adage that "it takes a village to raise a child". The "village" concept represents a sense of community life, good human relations and hospitality. The proverb refers to an entire community of people interacting with children so that those children can experience and grow up in a safe and healthy environment. The villagers look out for the children. The James Model proposes that the concept "village" be extended to include the "global" or "virtual" "village" (Founder Masters

Dissertation 2010). In the dimension of the "virtual village", traditional concepts such as the extended family, community and society are expanded and given a "virtual overlay". The Trust defines virtual adoption as,

> "A form of supplementary support in which a virtual extended family (cluster or team) through a community-based organisation gets matched with a vulnerable family (child care unit) and in so doing supports the legal guardian or primary care-giver to ensure family-based care of the children entrusted to them" (Founder's Masters Dissertation 2010).

> "The 'virtual family' can be situated anywhere in the world, and the relationship between the child and the virtual family can be managed within an integrated technological system with effective policies, processes, procedures and practices" (Founder interview 29/03/2019).

The difference between the Trust's thinking and the approach of other child aid organisations is in the way the Trust integrates the care of households in communities to a solution that is market-based and not charity-based. The Trust is building an integrative system in which they aim to link "holistic care products and services to a solidarity-based market as a means of sustainable income to organisations working with children and families within communities" (source document on James 1:27 Trust service offering 2016).

> "To build a social market (e-commerce) where NGOs can monetise, productise, commercialise their value offering. This is sold to a social consumer (member of the public) who subscribes to the service as an annuity in order to mitigate against social risk. The cost of the subscription is offset by a tax deduction and loyalty benefit. Leveraging access to the social consumer is through the social capital embedded in corporations. The use of biennial expression (binary expansion) is used to drive mobilisation. What we now have is an emerging social market, located within the dream society, where social consumers subscribe to social products and services in order to mitigate social risk. The outcome of which is the promotion of social justice and the common good. The key to this scenario is the role of leadership with a renewed sense of its own value" (source document, Davos-Klosters – input on World Economic Forum meeting 2015b).

In this case, the Trust views the deficit as a space for a "Social Market"—an access point for "transaction and transformation" of care through a much larger societal response in a relational network. The Trust conceptualises the "market" as a transactional place where the Trust wants to link the "consumer" or "buyer" (people within society) to purchase specific care "products and service offerings" of "service providers" (care organisations in communities) (source document, Davos-Klosters – input on World Economic Forum meeting 2015b). The Trust views the "society" that needs to respond to care-related needs as ordinary people willing to contribute to the well-being of the entire society, and who typically want transparency, accountability and to feel that their contributions have an impact (source document on James 1:27 Trust service offering 2016). The Trust also works on a philosophy of "tree, seed, forest" where a person would invite two people to purchase services on the Social Market, who will in turn invite two people, all giving small amounts but together creating a large social network.

> "In this transfer of capital, there is both a transactional and transformational component. Underpinned by which is a business industry standard supply chain system making for efficiency and as a consequence the potential for scaling. The net effect is that the social contract and promotion of the common good can become framed within a market formula. A market no different from any other but within a different industry to that of retail, agriculture, mining and manufacturing. What is emerging therefore is the care industry. The care industry offers hope to the challenges faced in the other industries" (Founder 17/12/2017).

The Trust's idea of an online Social Market forms part of the idea of a futuristic and emerging Dream Society (Jensen 1999), which brings about a shift from an information-based to emotion and narrative-based society. For example, people purchase free-range eggs even when they are expensive, based on the narrative that the birds are treated and reared in a more humane way. In Jensen's (1999) analysis, over the next few decades products and services will have to be more than only useful, but also able to fulfil an emotional need, which will lead to new products, services and markets. This is where the Trust believes that "a new care industry can emerge where capital such as human, social, intellectual, relational, infrastructural, technological, political and spiritual are transferred from the wealthy to the vulnerable" (Founder note 17/12/2017).

The Founder (29/03/2019) sees this as viable due to the experience with sponsors of household members since the establishment of the Trust,

> "These sponsors have given continuously to the Trust over many years, which helps for the sustainability of care and demonstrates that the emotional link and narrative between the beneficiary and sponsors can create sustainable giving. It was the beginnings of demonstrating "seed-tree-forest" by mobilising social and relational capital/networks to support the care of households and children."

The above sections provide an overview of the Trust's vision, mission and conceptual thinking. As mentioned at the beginning of this section, concepts carry specific meanings, and the following section will critically analyse the thinking and concepts used by the Trust, since the organisation's claims to thinking relationally do not always correlate with the language and concepts that they use.

5.3.3 Critique of concepts and terms

This section will analyse the Trust's language and concepts in three categories. The first is the Trust's language as it relates to how it is used in mainstream development theories. The second is how it is used in relation to business terms and concepts, and thirdly, how the Trust's thinking and language relate to capitalist terms and concepts. The analysis points to the "blind spots" that often accompany the use of terms and concepts in the development and NGO sector. The below section will be referring to interviews and the focus group with the Trust as part of considering the meanings attached to these terms.

5.3.3.1 Mainstream development terms and concepts in development theory and practice

Sub-section 3.5.1 explained the Trust's mission and response, which highlighted some of the key terms that the organisation use, such as "empowering care", "transaction" and "transformation", "orphans, vulnerable children and youth" and "beneficiaries". Greater consideration will be given in this section to the meanings attached to these development-related terms.

Conceptually, the Trust's use of "empowering care" in their mission statement reflects what is often found in development studies: development agencies and organisations as providers of services to "empower" individuals and communities. Almost every field of research and practice concerned with the "powerless" has a tendency toward adopting "empowerment" as a path to improvement (Weidenstedt 2016). The term indicates the transfer of power to an "agent". In the Trust's case, the agents are household members and care organisations in communities who can act independently and make their own free choices. The Trust's use of "empowering care" is aimed at improving people's lives through the transfer of resources, but more specifically in a model of holistic care and development that leads to independence/autonomy and, ideally, reciprocity.

Words such as "empower" and "empowering care" assume a power dynamic where the "receiver" of care will be "empowered" by the "giver" of care (Weidenstedt 2016). As argued in chapter three, section 3.4.1, "empowerment" is often used positively in the field of development, but language and connotations attached to words can have a negative effect. The Trust aims to empower care, which is meant to signify intrinsically positive change (such as empowerment, participation, poverty reduction) but falls into the language of development orthodoxies. Terms used in development are not neutral and acquire meaning as they are turned into policies that influence how those who work in development think about what they are doing (Cornwall & Brock 2005). Terms such as "empowerment" carry the baggage of the orthodox development trajectory. The human economy paradigm would contest such a term, arguing that it fails to give agency to the "receiver" of care (Hart 2013). This language is oblivious of the top-down power relations it represents and is therefore "trafficked" into neoliberalism.

Similarly, concepts such as "transaction" and "transformation" in the Trust's Social Change Theory suggest complex power dynamics, expectations and communicative challenges. The underlying meanings and different interpretations of these concepts have implications for the transactional and relational decisions made by different parties. Power limits agency when a party no longer experiences the capacity to effectively act as an agent and loses the capability to make a difference (Emirbayer & Mische 1998; Fuchs 2000).

Therefore, the transfer of resources has relational and psychological implications. The less powerful is deprived of agency when interacting with the powerful due to the unequal power

dynamics in resources and in the ability of the powerful to set the standards, conditions and expectations. The transactional component can result in the party on the receiving end to no longer experience themselves as having the capacity to effectively act as an agent, and would therefore be disempowered (Weidenstedt 2016). The risk is that those with more power (in terms of resources and setting the terms and conditions) may encourage participation, promote fairness and convey respect (Ashcroft et al. 2017: 34) but the *empoweree* may still not feel in a position to participate due to power differentials. As an example, one of the household members left an anonymous note during the focus group (16/03/2019) which stated, "there's a lot of respect we are showing, and fairness is good, but less boldness". The participant highlights that the Trust and household members show respect and treat each other fairly, but as the *empoweree*, the participant lack boldness to be completely honest and open with the Trust.

Research on exchange (through, for example, gifts, money or volunteering time) have shown that the exchange process makes visible social hierarchies and power inequalities between the "giver" and the "receiver" (Mauss 1990). In the idea of "transaction" and "transformation", both the *empowerer* and *empoweree* might be aware of the power differential, but the *empowerer* will often underscore the high power differential simply by offering to empower the less powerful party (Weidenstedt 2016: 5). The lack of boldness, which was referred to in a note, was discussed during the focus group (16/03/2019) and Mark (CEO of the Trust) commented,

> "Whether we speak about it or not, there are power and resource barriers which I think changes the nature. It's easier for us to be completely honest with you than for you to be very honest and bold with us. I think that is the word that stood out for me, the respect and fairness is there but the boldness can be hard because there are differences. We carry resources and there are differences in power in the relationship which we need to be honest about, that they are there, and it can affect how that relationship works."

Power and exchange are often linked to resources, as discussed in chapter two (section 2.3.2) and chapter three (section 3.4.1). Those with resources are often seen as those with the power to decide "who gets what, why and how", and raises questions of power asymmetries, social exclusion or inverse inclusion and whose reality counts (Chambers 1995). The more powerful parties (with the resources) can set the conditions and rules of engagement with the choice to

withdraw resources if the receiver does not comply with the conditions. As a result, those without the resources may be less "bold" in their interactions with those with the power resources, even when attempts are made to encourage and allow for participation. There are assumptions, ascriptions and messages evident within the interaction between the giver and receiver of resources, independent of how unaware or unintentional these may be (Weidenstedt 2016: 5).

Furthermore, the Trust's use of terms such as "orphans, vulnerable children and youth" and "beneficiaries" together with "empowering care", supports Cornwall and Brock's (2005) argument that the configuration and combination of how words are framed can influence how terms are used and understood in development. Orphans, Vulnerable Children and Youth (OVCY) is a label that has been used to capture the growing challenges experienced by children affected by HIV/AIDS and has facilitated implementation of programmes focused on mitigating the social malaise faced by children classified as OVCY. However, increasingly, scholars have raised concerns about the unintended effects of labels. In the field of social work, Lombe et al. (2017: 2), for example, point to evidence that labelling children "may have unintended negative social and psychological as well as disempowering effects on children classified as vulnerable".

Similarly, the Trust often speaks of "beneficiaries" (referring to household members under their care or under the care of other organisations). The word is also used widely by governments, multilateral organisations, NGOs, civil society, and development experts. However, the word carries many assumptions and biases. It assumes that beneficiaries will benefit from development projects and "development workers" supposedly know what is needed. Consequently, it leads to the overestimation of the importance of development workers, while underestimating the knowledge, understanding and solutions of "recipients" in their reality. It also creates a sense that people are passive recipients of handouts.

The Trust's use of the term "beneficiary" is problematic and suggests a more "top-down" and *unrelational approach* despite claims to build relationality. The prevalence of "us" and "them" in the conversations between household members and the Trust already indicates a sense of difference and distance. When household members used the word "beneficiaries" during interviews and the focus group, the term was not viewed positively. In an interview, Tsebo (02/04/2019), for example, said that "we are not just beneficiaries", indicating that he does not

want to associate with the Trust simply as a beneficiary who gets resources from the organisation.

> "It is also easy to relate with Mark and he helps me with my studies when I come to the office at the Trust. It is not just a duty for the Trust. The communication is good. *We are not just beneficiaries* (emphasis added) but feel comfortable at the Trust" (Tsebo 02/04/2019).

Similarly, Sechaba (16/03/2019), who is the head of a household, attached the word beneficiary to negative experiences with the Trust and describes it in purely transaction terms,

> "Normally I feel that we communicate *only when it is beneficiary* (emphasis added). It is either when someone wants something to happen or if someone wants you to do something."

The Trust's use and combination of the above terms show how so-called alternative paradigms and ideas of development often get co-opted into the mainstream, as suggested in critical literature on mainstream development (discussed in chapter two, section 2.2.3) (Hettne 1995, 2008). Concepts such as "empowerment", "transaction", "transformation", "orphans, vulnerable children and youth" and "beneficiaries" are still operationalised in top-down approaches and mainstream development thinking. The official discourses and practices of capital "D" *D*evelopment (as coined by Gillian Hart and explained in section 2.2.2 of chapter two) have re-emerged in old and new guises in the era of neoliberal capitalism precisely in order to mediate its destructive fallout (Hart 2006). Despite the Trust's mission of "empowering care", the language used can have a disempowering effect.

What happens and does not happen in development practice manifestly depends on development actors. Chambers (2005a: 11) highlights the importance of the power of language in development when he states that,

> "What they do and how they do it and what they do not do, what they say and how they say it and what they do not say, and on their behaviours, attitudes, mindsets and relationships, that it is nothing short of bizarre that these personal aspects have received so little attention. Should they, not least in the domains of language and development,

now be placed centre stage? And are the words which we use and the uses which we make of our personal power a place to start?"

The above terms, language and concepts are used widely within the development sector, but there are also other terms that the Trust uses that relate more closely to theories and practices in business, as will be explained in the next section.

5.3.3.2 Business terms and concepts in development theory and practice

When the Trust's Life Cycle Approach is considered, a similar critical reflection should be made on the language and use of terminology. The Life Cycle Approach is based on Life Cycle Management, which is a business approach to the total life cycle of products and services. It follows the thinking that businesses have environmental, social and economic impacts through the activities they must perform. Life Cycle Management is, therefore, used to understand and analyse the life cycle stages of products and services of a business, identify potential economic, social or environmental risks and opportunities at each stage and create ways to act upon those opportunities and reduce potential risks (Sonneman et al. 2015).

The influence of a business approach is prevalent in the language that the Trust uses. The Trusts' holistic development includes an evaluation phase where "we look at the *impact and efficiency* (emphasis added) of our intervention…" The Trust also uses terms such as "services" and "clients". Clients refer to both the household members under the direct care of the Trust (as its first client) and to the care organisations that the Trust wants to support through James Integrated Services. The Trust aims to create similar standards and performance to businesses, but as a way to create social value for care (instead of improving efficiency and effectiveness for profit).

However, the use of words such as "clients" implies a human interaction expected in the business world rather than in a trusting and helping relationship within care. The Trust often speaks of creating a sense of family with the household members in their care, but language such as "clients", "services" and "efficiency" creates distance and is more impersonal and *unrelational*. In the field of medicine, research on whether people preferred to be called "patient" or "client" has revealed that most people preferred to be called "patient" and points to implicit assumptions inherent in the use of specific labels (Deber et al. 2005; Jackson,

Hutchinson & Wilson 2016; Magnezi, et al. 2015; Peters, Cunningham & Dickens 2016). A major problem with using words such as "client" is that it defines the relationship primarily as an economic or commercial one. The origin of the word relates to "a plebeian who sought the protection and/or patronage of a powerful patrician" (Shevell 2009: 1). In the South African context and history, the use of language should be considered carefully so that it does not unintentionally create distance when the purpose is to build relationships.

The above use of business terms in development also relates closely to how concepts and terms are used in a capitalist environment and its implications on how development is approached, as explained below.

5.3.3.3 Capitalist terms and concepts in development theory and practice

Another concept used by the Trust that needs further examining is the Social Market. The use of language and terms such as "monetise, productise, commercialise their value offering", and "social consumer" is problematic as it feeds into the rhetoric of neoliberal capitalism, which is about competition and profit as opposed to building collaborative, social and solidarity-based solutions that are more relational. Cornwall & Brock's (2005) argument raised in chapter three (section 3.4.1), on the configurations of terms and language in development, raises important questions about the terms used as integral to the Social Market. The Trust's use of words leaves little place for talk about volunteerism and participation when users become consumers. Similarly, when "poor people are empowered" through the marketisation of services it leaves little space to engage on how basic rights become commodified in a market solution.

The Social Market easily slips into mainstream development language. The mainstream development "solutions" to development tend to co-opt and repackage counterdevelopment language into the same capitalist and neoliberal narrative, trying to solve problems through the same paradigm that has created the problems (Knutsson 2009). Winlow and Hall (2013) make a scathing criticism of attempts within capitalism to change or reposition itself as champions of social justice and as the answer to development and poverty due to its inherent competitiveness and profit motive. The idea of a Social Market can easily fall into a variant of the 1950s 'development as modernisation' paradigm and development as economic and technical process (Lewis 2019). As a result, the Social Market can become a place where access

to markets can be facilitated for marginalised groups, but it hinders the view of development as a process dominated by structural inequalities that require redistributive outcomes.

The idea of a Social Market risks a "top-down" approach in the South African context, with high levels of economic and social inequality and tensions as a result of history and patriarchal colonialism. A Social Market that functions within individualism, capitalism and consumerism risks becoming 'absolutised' as a goal in itself rather than a means by which to strengthen relationships and promote general well-being (Samuelson 2017). A solidarity economy (as defined in section 3.3 of chapter three) challenges capitalism and the social relations upon which capitalism thrives and promotes building "grassroots" movements, local ownership and cooperatives within communities (Laville 2010; Satgar 2014). But this idea of a market and the transactions of social goods and social services shapes the nature of the relationships, which is different from ideas that shape a solidarity economy. Transactions are often impersonal and if driven by commodities and profit are likely to lead to more exploitative, competitive and destructive environments, as is evident in excessively capitalist contexts. There is a risk that NGOs and care organisations will have to compete on the Social Market and those who are already in a better financial position will have a much greater ability to access the market, but that does not mean the "services offered" are better than those without finances.

Another challenge with the Social Market and other virtual and online ideas is the risk that NGOs with limited understanding of the contexts in which they work can create a weak information loop between what is shared online and what is happening in communities. As a result, decisions taken by development NGOs can be erroneous, or have unintended negative consequences. The internet facilitates the control or influence of individual people and small organisations, but it is not certain that the poorest will be reached and engaged, or what power and relational dynamics will be created within such an interconnected web. Next to language issues, (digital) illiteracy and relevance of information, there are also cross-cultural differences that are easily overlooked when using social media (Toyama 2010).

Although there are examples of NPOs[5] who have been able to utilise and generate substantial income from social media in South Africa, the experience of the Trust thus far has been

[5] For example, The Greater Good South Africa was voted as part of the top 10 most trusted NPOs in the country in 2010. They connect and inform the "public" throughout South Africa of news and research findings about social

different. The Trust has not made inroads into getting people to sponsor through online and social media platforms. The CEO (02/10/2019) of the Trust estimates that only about two people become sponsors independent of personal connections, while the vast majority have come through direct contacts of people working or closely affiliated to the Trust. The CEO elaborated from his experience with other NGOs that much of "signing up" happens through "word of mouth", which is contrary to the literature on the significance of raisings funds and gaining sponsorship through online platforms.

> "When it comes to sponsors and volunteers signing up, I'm not so sure. The business model of [name of NGO] is to partner with big corporates and to offer them an in-house volunteering system for their employees to improve morale and engagement (in return for greater employee loyalty to the company). But outside of corporate volunteers, I'm not sure how much they get. If you look at their actual financial donations, their volumes are very small. I suspect there are a few major players that most people know about – Givengain, BackaBuddy, maybe one or two others I'm forgetting. [Name of NGO] used to spend a lot of money on marketing, but they found that the more they advertised, the lower the quality of the volunteers that came through. Now they spend very little on marketing. Word of mouth turned out to be the most valuable channel" (Mark, CEO 02/10/2019).

The reality thus far is that sponsorship over the last fifteen years of the Trust is largely due to personal relationships. One of the sponsors (Sai) worked for the Trust for a few years. When she left due to another job opportunity, she became a sponsor. In the interview Sai (6/11/2019) said she wanted to continue her support to the Trust as a sponsor due to her time spent at the organisation and a deeper understanding of the philosophy and vision of the organisation.

During other interviews with sponsors, feedback on the reasons why they sponsor the Trust include:

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development initiatives and needs of NPOs. They have an online community of over 13,000 members and have raised over R54 million. Their consultancy arm, Greater Capital, has facilitated the investment of over R800 million into social development and enterprise projects. They have one of the largest NPO social media presences in the country, with over 6000 followers on Twitter and over 3000 likes on Facebook (Nonprofit Network, 2013).

> "Even if we have not heard from the Trust since we gave a substantial amount it will not deter us from giving, because of personal relationships with Richard [Trust Founder], the bigger vision, shared values and the unique focus that they have. We also understand it [communication] is an issue of capacity… and takes time to give feedback" (Mishka 09/10/2018).

> "We have little knowledge of each other's personal interests, goals, values and circumstances, but we understand the vision of the Trust which is enough for us… We worked in the same office building many years ago… I have read through all their documents and believe in what they do. This is what is most important to me and us as organisation supporting them" (Johan 6/11/2018).

The Trust is still in the development phase, and it is not clear yet how things may change if the Trust starts operating on a larger scale, but, so far, it seems that the reason for the organisation's sustainability is due to the social and personal networks of those in the Trust. The concept of the "seed-tree-forest" has created a network around the Trust that has brought some stability in the operations and care of the organisation. Even though the Trust has been able to bring in stakeholders (sponsors, volunteers, "champions") through personal connections to the organisation that have sustained the organisation and its care for 15 years, the Trust has not recruited new stakeholders through existing stakeholders or through online platforms. There are still many unknowns and untested ideas about creating a Social Market and improving care.

The next chapter aims to deepen the understanding of development and care by analysing the data through a relational lens. Thus far, the above analysis has pointed to the strength and dominance of mainstream development concepts and language, which have implications on development practice. Similarly, "blind spots" in development can also be identified in human development measures and indicators. The final section of this chapter gives an overview of the development status of Trust household members in comparison to other households (as explained below and in section 4.4.3 of chapter four). Following this, chapter six will reveal why these measures are limited when relational methods and measures are considered in human development.

5.4 Multidimensional Poverty Index results: Trust households and "non-intervention" households

Many variables and various reasons can be attributed to the current "status" of household members. In terms of development, it raises questions on how other households without the involvement of care organisations or NGOs ("non-intervention" group) in a similar context are doing in terms of human development indicators when compared to Trust households. As explained in the methodology chapter (section 4.4.3), the Multidimensional Poverty Index (MPI) (UNDP 2019) was employed to collect the results on living standards, education, income and support structures from three heads of households within the Trust care and from three heads of households in the "non-intervention" group who live in the same area as the Trust households. In cases where it was difficult to attain information, the researcher focused on household members' retrospective memory of "dramatic" events (such as death or teenage pregnancy) in the past that influence the present and shape how the individual and household operate.

Standards of living include questions on cooking, sanitation, drinking water, electricity, housing and assets of households (UNDP 2019). The feedback from both Trust households and "non-intervention" households showed similar results. Both groups had the following:

- Enough rooms and beds in the house.
- The houses of the Trust households and "non-intervention" households are either built with cement, zinc or mamparra bricks (which are cheaper).
- Only two households (one from the Trust households and one from the "non-intervention" households) have flush toilets that work when there is water, and all the households have pit toilets in their backyards, which they do not share with neighbours.
- All the households (the Trust and "non-intervention" households) have electricity but work with fire when the electricity is unreliable.
- Most of the households get water from the tap if it is available. However, water comes mostly from the municipal truck once or twice a week, a Jojo tank in the community or a borehole.
- The Trust and "non-intervention" households have electricity, a refrigerator, a television and mobile phones.

There was thus not a significant difference between the Trust and "non-intervention" households in terms of their living standards.

The health of households includes questions on nutrition and child mortality (UNDP 2019). Measuring the health of household members was not possible, and there is no detailed track record available. However, all the household members have lost babies or relatives in their teens, twenties or thirties, even if it was challenging to get precise numbers, details or causes of deaths. A major issue that was mentioned in several interviews was the high prevalence of HIV/AIDS and teenage pregnancies.

The education levels of households include questions on years of schooling and years of attendance of household members (UNDP 2019).

- In total, in the Trust households, one person has completed tertiary education; one is enrolled in tertiary education; two have post-matric training; two have completed matric; one has not completed matric but received training; seven adults have not completed matric and the remaining members are children either in high school, primary school or in crèche.
- In the "non-intervention" group of households, two people have a tertiary education; one is enrolled in tertiary education; one has matric; nine adults have not completed high school; four adults have not completed primary school and the remaining members are children either in high school, primary school or in crèche.

Education levels are thus also similar for the Trust and "non-intervention" household groupings.

The researcher asked additional questions (as explained in section 4.4.3 of chapter three) about the income levels of households and who they viewed as part of their support structures. These questions are not included in the MPI, but the additional questions on income, employment and additional support seem to vary more significantly between the Trust and the non-intervention groups than the MPI indicators on standards of living, health and education.

- The Trust has two members who have permanent employment and three with periodic employment. Further income from grants combined for the three households is around R6000 per month. The combined income for all Trust households is between R16 000 and R20 000 per month. Additionally, the Trust spends an average of R5000 annually

per individual in the household on costs such as transport, clothing, telecommunications, crèche fees, food and health costs when necessary. Further support over the years includes training, studies, mentoring, psychological support, extra lessons, office space, additional resources such as laptops, internet and other support for work and studies.

- The non-intervention group income includes periodic employment and grants with a total of R10 000 per month for the three households combined. One of the household members receives government funding for studies for tertiary education.

Comparatively, the households of the Trust have a combined higher income than the non-intervention group as well as additional support not reflected in the above amounts.

The household members were also asked who they considered as "support structures". The heads of household from the Trust included the following in their support structures. Household one's head (Lesedi) considers the James 1:27 Trust as support to her and her household. She highlighted the social worker as someone who "understands me well, she makes sense of things and puts me first". She also mentioned that they support each other in the household and get support from other Trust household members (such as Tsebo). In the community, Lesedi said, "we do not have support from the community, everyone is doing their own thing" (Lesedi interview 13/03/2019). In household two, Sechaba (interview 19/03/2019) points to support from the Trust and in the household.

> "We support each other as a family. We meet all the basics needs. We don't run out of food most of the times. We do well at raising the kids. The Trust has helped a lot with education and extra support, which is not cheap. I could not have done it myself. It helps to support us where we and the government are limited."

In household three, Khabane (19/03/2019) lists that they get support from the Trust, as well as from another organisation with care workers in the community (partners of the Trust), and the household supports each other.

The "non-intervention" group, with no support from an organisation mentioned the following as support structures. Household member 5 said that they receive support from family – cousins, uncles and aunts on both parents' side. They have also received support from the school and teachers where he was working at the time (interview 26/02/2019). Household member 6 mentioned that family and the first-born brother is someone she can talk to, but do

not find support in the community (interview 26/02/2019). Household member 7 said there is no support (interview 26/02/2019).

The above results show that there are no significant differences between the living standards and education of Trust households and the "non-intervention" group, but Trust households seem to be in a slightly better position in terms of income, opportunities and additional support. From MPI indicators (UNPD 2019), which falls within the human development paradigm, (Alkire 2013) the differences are small. The Trust aims to provide holistic care, but have not always had the resources, capacities, systems and processes to give extensive holistic care. The "success" of the organisation from a human development perspective is also difficult to evaluate or quantify, since its care is limited to only a few households and has developed organically throughout the years. It is also difficult, with the existing data, to make strong correlations between specific interventions and whether certain outcomes can be linked directly to those interventions since there are many variables, and each case is unique.

However, the above data reveals differences between the Trust households and the "non-intervention" group on questions of income, opportunities and support structures, which are questions not included in the MPI. It shows that there are factors that are not always considered in typical human development indicators, which Chambers (1995) and Schluter (2006) have also pointed to through more critical scrutiny of development measurements. As argued from the literature, the human development paradigm and its measures tend to be individualistic, focusing on freedoms and capability (Deneulin 2006; Ricioeur 2006; Schluter 2006), but poverty is a complex combination of causes and effects including relational, emotional, physical and financial.

As discussed in section 3.5, the human development paradigm that developed from Sen's capability approach is a useful tool in providing information on what we should look for to judge how well someone is doing as an account of well-being or human development. The inclusion of human functioning (beings and doings) and capabilities (the opportunities to achieve those beings and doings) provide part of what is needed for interpersonal comparisons of well-being. More broadly, the capability approach often pays attention to other normative considerations and values such as efficiency, agency, empowerment and procedural fairness. However, the capability literature is not clear on who is responsible personally or collective for development.

Capability theorists remain largely silent on who should bear the duties and responsibilities for the expansion of selected capabilities (Robeyns 2016). Instead, the argument is that getting out of the poverty trap is expensive and requires vast amounts of resources and capacities that are more holistic in approach. Nevertheless, Nina Munk (2014), shadowed Jeffrey Sachs (who is one of the most famous development experts in favour of more aid) and found that despite significant investments in poor villages in countries such as Uganda, Kenya and Somalia, none of the efforts could be sustained without aid. Development theorists and practitioners are aware of these problems and have tried to overcome them through programme design. Research and efforts have underscored the need to do development differently, but continue to fail.

The above raises questions on people's relational capabilities to function. What are the relationships that influence the actions, choices and outcomes of an individual or group? The next chapter will explore the relational dynamics in the Trust environment and how the relationships in the Trust have shaped how care is viewed and to what extent care is about the tangible and material results or about the intangible. The Relational Framework is used to examine some of the underlying practices, processes and behaviours of relationships as a way to better understand the extent to which relational value is built between different individuals and groups and how it can inform a relational economy.

5.5 Conclusion

This chapter provided an extensive overview of the James 1:27 Trust's mission, vision and objectives as well as a critical analysis of the pitfalls of adopted development concepts and their practical implications. There are many development concepts in development theory and practice that are used without questioning the underlying assumptions, values and standards attached to these terms. The adoption of certain words and standards shows the continued strength of mainstream development thinking despite considerable criticism of its assumptions, "one-size-fits-all" and top-down approaches in the development discourse. There is a gap between how these words are used and what they imply, and what is then done in practice. The Trust claims to develop a care model with systems and processes to create a supportive and caring society. However, they have co-opted mainstream development terms that may undermine their relational approach.

For example, a term such as “empowering” was described in this chapter to connote top-down power relations where the “giver” of care has the resources to determine the conditions under which these resources are given to the “receiver”. Similarly, terms such as “orphans, vulnerable children and youth” and “beneficiaries” could have negative and disempowering effects on children who are classified as vulnerable. Words like “clients” and other business terms define relationships primarily in economic terms and create distance in a relationship. Other words such as “monetise, productise, commercialise” “value offering”, “social consumer” and “social market” risk falling into competitive capitalist behaviour. The idea of a Social Market addresses the effectiveness and efficiency with which social goods and services are delivered, but it will not necessarily address structural inequalities. Furthermore, a Social Market could potentially diminish personal involvement in care, volunteerism, participation and local ownership, and overlook cross-cultural and contextual differences between the “givers” and “receivers” of resources. It is not only the words and language used but also standards of care (such as the UNCRC index) largely adopted from “Western” norms and standards that have a tendency to be individualistic and lack a relational approach to development.

When the Trust’s language and concepts are considered alongside human development indicators (as measured by the Multidimensional Poverty Index), it appears that the Trust has not made a significant difference to the holistic care of a small group of households. However, this is based on the preliminary research of the Trust. Further in-depth research through a relational lens provided a more nuanced perspective and revealed aspects of care and development that are not currently being addressed by care interventions, yet they have shaped the care within the Trust significantly. When the human development philosophy with its measurements are applied, it misses important areas of development. A relational lens provides indicators that allow for questions that are not being asked in development. The following chapter provides a more in-depth analysis of the relationships in the James 1:27 Trust in order to contribute to a deeper understanding of relational issues that shape development and how they inform a relational economy.

CHAPTER 6: EXPLORING A RELATIONAL ECONOMY THROUGH THE RELATIONSHIPS OF CARE-"GIVERS" AND "RECEIVERS" IN DEVELOPMENT

6.1 Introduction

Chapter two discussed some of the key perspectives on development and highlighted two main theoretical positions, namely those of neoliberal and neo-Marxist perspectives. The research has already discussed that while neoliberalism focuses largely on economic transactions and markets to coordinate economic activities, it builds on the classical traditions within liberal laissez-faire (chapter two, section 2.3.1), which promotes free markets and individual freedom in which individual choice explains economic behaviour. According to the laissez-faire theory, hard work and discipline are desirable to develop and move out of the income poverty trap (Harvey & Reed 1992). Neo-Marxists analyse societal issues from the perspective of power relations, politics and interest groups where unequal social structures persist from one generation to the next as hierarchical structures. It, therefore, also brings a much sharper focus on inequality. Unequal structures are perpetuated as racial and gender discrimination and nepotism, since certain groups are deprived of opportunities such as jobs, education or social assistance due to the economic and social marginalisation of an entire group of people (Harvey & Reed 1992; Lewis 1968).

The dominant theoretical positions summarised above appear somewhat limited in their understandings of the interrelationships and dynamics between the different groups in development interventions. The lived realities and relationships between development organisations as the "givers" of resources and the "receivers" or recipients of resources shape behaviours, attitudes and actions. Can there be a transformation in the relationship between an NGO and households under their care? This raises questions on who "transforms" these relationships, under which circumstances and what the possibilities for successful "transformation" are. What does the transformation in the relationship look like practically? Is there something that enables these relationships to change, or is the relationship largely bound and limited to structural and even ideological differences between the groups? These questions will inform the aim of this research to explore a relational approach to the study of development. Given the above focus, the main objectives of this study were to:

1) Examine the relational dynamics between the NGO (James 1:27 Trust) and the households under their care.

2) Utilise Relational Thinking and the Relational Proximity Framework as the method to understand the relational dynamics between different people and groups.

3) Analyse how perceptions on the quality of relationships between people influence and impact development.

4) Reveal methods and indicators that are not often considered in development studies.

5) Understand how relational dimensions and indicators relate to development theory and practice.

This chapter provides thematic analysis of primary data through the lens of relational economy. The first section will present the context of and background to the Trust's relationship with household members together with the results from the Relational Proximity Framework (as discussed in chapter four, section 4.4). These findings will be explored further to interpret the emergence of relationships between the so-called "givers" and "receivers" in a development intervention and to what extent relationships are sustained during a crisis. This section will show that the health of relationships is not simply dependent on the success of interventions, but rather on whether there is a deeper understanding of belonging, respect, trust and other relational aspects when dealing with different responses within a crisis. As such, a deeper understanding of how relationships are perceived between people within a development intervention contribute to a fuller picture of development and factors that are important but neglected in the current development discourse (as argued in chapter three, section 3.5).

The remainder of the chapter will present the Relational Proximity Results as they were shared with the Trust and household participants during the focus group, and then explore the themes that emerged from the focus group discussion. Participants described the relationship as a journey where "money" and "goodies" are not always important. Instead, relational aspects emerged from the discussion, including words such as "commitment", "never giving up" or "never rejecting", "guiding", "caring" and "being somebody". These words and how they are interpreted challenge current development language (as discussed chapter three, section 3.4.1 and chapter five, section 5.3.3). This chapter will further explore how emerging themes such as family, belonging, truth-telling, and honesty are interpreted by participants to show how human development indicators (such as education) form part of the dynamics in a relationship within holistic care and development.

With the above in mind, the last two sections of this chapter will focus on identity formations between participants. Broadly, what has emerged is that development is "messy". In the South African context, participants want more than a social worker; they also want a parent and an "extended family". These findings are significant, since they challenge the clinical role of so-called experts in development practice. The findings show that increasing interdependence has developed between participants over a long period, which has been significant in helping them embrace and accept pain in the relationships. Participants do not want to disappoint others in the relationship, which can also be viewed positively as a way to build interdependence without creating dependency. The continuity in the relationships have developed over a long time and what is emerging is a deep sense of "wanting to give back", which forms part of the reciprocal relationships as they have been built over time.

The themes that emerged, therefore, challenge the dominant development models. Development is not only about the interventions that are needed but rather whether relationships in development are strong enough to hold the weight of the stress in development. The following section will start by detailing the background of the Trust and household relationships.

6.2 A snapshot of the relationship between Trust care and households

This section will focus on the context and history of each household in relation to the Trust, the combined RPF results on the interpersonal relationships and a brief description of the current status of households. The focus on the Trust and household relationships has been particularly pertinent in understanding the dynamics of different relationships in development and how these could inform a relational economy.

The care team include staff members of the James 1:27 Trust who work directly with household members in their different roles and capacities. The founder (Richard) and the social worker (Samantha) were selected since they have most frequent contact with households and Richard has the longest relationship with the households. As explained in section 4.4.2 of chapter four, the figures below are based on the RPF relational surveys, which posed a positive as well as a negative statement for each question with a rating from 1 (very poor/negative) to 6 (very good/positive). The respondents gave a rating on the scale, depending on whether they associated more closely with the negative or positive statement. The diagrams below provide

the overall scores for each driver (directness, continuity, multiplexity, parity and commonality), which was converted on a scale from 0 (very poor) to 100 (very positive) based on the overall perceptions of the relationship as scored by all respondents. The background information of each household is also provided to contextualise them and provide detail for further analysis.

6.2.1 James Trust and household 1

Household one (Lesedi and Jabu) was taken under the care of the Trust in 2004. Household one lived with their grandmother. Their mother was a domestic worker who had to live in the city since it was too far to travel every day. The grandmother was verbally abusive and when their mother heard this, she decided to move closer to where Lesedi and Jabu were living and take her children with her. At the time, the household consisted of Lesedi, Jabu and two siblings living with their mother and stepfather. The time they lived together is described as a happy time, but in the same year (2004), their mother and two siblings passed away and their mother's family told their stepfather to leave the house since it was not his house. The extended family took most of what was in the house and abandoned Lesedi and Jabu.

An Anglican priest and his wife met Lesedi when they shared meals with children at a community centre in Bela-Bela (an hour from Pretoria). The priest was also a board member of the Trust and the Trust decided to formally take Lesedi and her brother under their care. Jabu was addicted to glue and the Trust lost contact with him, but they still have a positive relationship with Lesedi, as is shown in figure 7 and will be detailed below. Lesedi still has contact with and takes care of Jabu, while she lives with her partner and two children.

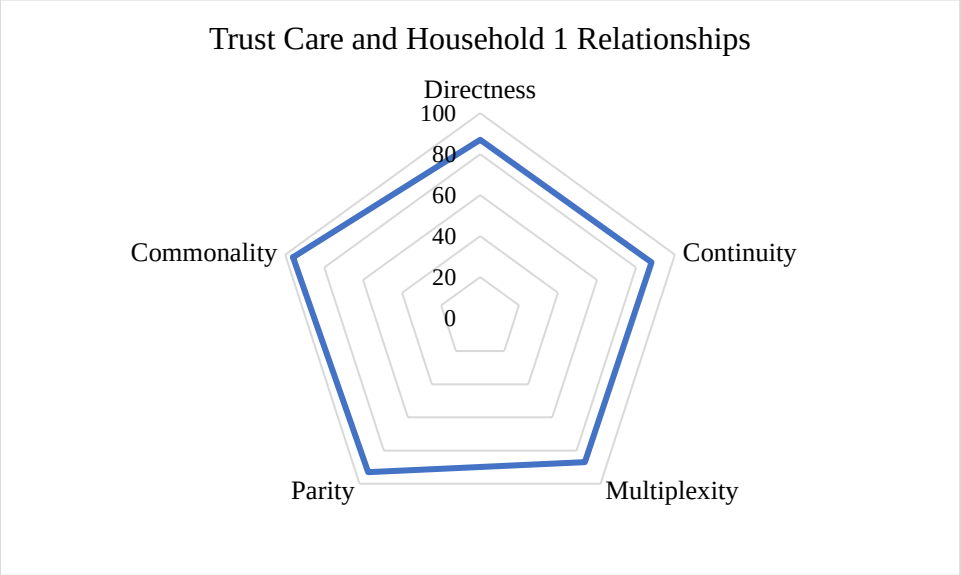
The relationship between Lesedi and the Trust was not always positive. Despite the interventions and care from the Trust (for example in terms of physical needs, educational support and other emotional, psychological and spiritual support), Lesedi fell pregnant in 2007 as a teenager and the Trust was unsure how to respond since they questioned whether the interventions made a difference. The priest convinced the Trust to not reject a child based on the choices they make and rather continue their support.

The Trust moved Lesedi to Pretoria to rewrite her matric to provide better support for her and her baby. Lesedi's time in Pretoria was significant in terms of building a deeper relationship with the Trust, but it also led to conflict and disappointment between the two parties. Lesedi

never fully adjusted to the environment, but she managed to pass her matric. The increased contact strengthened the relationship between the Trust and Lesedi, but it was also the closer proximity that led to disappointment and distancing due to the stress of the relationship. Richard (29/03/2019) reflected, "I didn't want to see her because I was tired, disappointed and I felt that she was making bad choices". The break in contact had interesting implications and was significant as Lesedi found an internship and completed her driver's licence during this time and the conflict was resolved after six months.

The results from the RPF show that the relationship between household one and the Trust is viewed by both parties as positive. Lesedi is the head of the household and answered the questionnaire on her relationship with the Trust care team, and vice versa.

Figure 3: RPF Trust Care Team and Household 1



The RPF results show that the relationship between the Trust care team and Lesedi is categorically positive (80% and above), which suggests that both parties are satisfied with the levels of directness, continuity, multiplexity, parity and commonality in the relationship. Both parties are satisfied with the quantity and quality of contact and continuity in the relationship and share a sense of mutual respect, participation, fairness and alignment of goals.

The positive results by both the care team and Lesedi may also reflect Lesedi's own resilience. This resilience has manifested in the way in which Lesedi has handled her brother's glue addiction, raising her children, handling a six-month period of limited contact with the Trust and financial distress in 2011, finding an internship and jobs while developing her skills

through trainings and furthering her studies. Financially, Lesedi has been independent from the Trust support since 2011 and she is proud that she is able to look after her household. In a Trust video where household members share about their lives (13/03/2016), Lesedi repeatedly explains her success in terms of the decisions she has made:

> I believe that if you tell yourself that is what you want, then that's what you will get. Only if you do it in the right way. I've done it, I believe that anyone can do it … I know how to buy clothes for myself, not to depend on somebody else ... I believe that as a woman I can do that for myself … but every human being can do that for themselves. If you have a vision and a mission for yourself, then I believe that anything is possible. As a single parent I have been through a lot. I have faced so many challenges, but with the help of God I believe that I have raised my child very well. I know today that I'm a strong woman. I can stand up for myself. I can even say that I am a better person today than before.

However, in Lesedi's words in inverted commas (from the focus group 16/03/2019), there is an interplay between her independence and a degree of dependence on the Trust. Her relationship with the Trust has instilled a sense of "giving back" to others as something that she feels she "has" to and "wants" to do to the extent that she studied Social Development and is now working for the Trust as the Care Coordinator. She is, therefore, engaging in relational behaviour through being "an example to others" as an extension of her dependence on the Trust, and now the Trust is also dependent on her as Care Worker in the organisation.

6.2.2 James Trust and household 2

Household two lives in a community north of Pretoria that is characterised by limited access to running water, sanitation facilities and poor infrastructure. In 2009, the Trust collaborated with a community-based organisation that has care workers in the community. Together, they conducted a sample study in the community to identify "vulnerable children and families". The results of this sample led to the identification of about 600 "vulnerable and orphaned children and families", of which household two was listed as one of the "most vulnerable" (source document on compiled history and overview of the James 1:27 Trust 2019). The Trust used its social network to find sponsors as part of the idea of virtual adoption (explained in section 5.3.2

of chapter five). When the Trust took household two into its care, the household consisted of the mother with her six children and three grandchildren and the mother's sister (the children's aunt). The mother of the household passed away in 2014, but the household also lost their aunt, baby sister and older sister in 2013 and their older brother had died in 2010.

The household currently consists of five young adult siblings (Khosi, Sechaba, Lebo, Lerato and Tsebo) and they take care of six children. The older sister who passed away had three children who are in primary and high school; Lebo has a child and Lerato has two children. The Trust has limited contact with Khosi (the oldest brother), since there was a breach of trust with finances and he did not want to participate in a restorative justice process. Initially the Trust invested most of the resources in Khosi to start a business to ensure a sustainable income for the household, but after the incident, their contact was limited. Sechaba (the second oldest brother) became the primary caregiver. Sechaba helped the Trust to dig a pit and install a toilet and sewerage system for the household. In 2012, Sechaba got a loan to build a house with four bedrooms for the whole family. Throughout, Sechaba has taken most of the responsibility for the household. He has worked intermittently since 2010. When his mother was sick, he took care of her and ensured that the grants and payments go to Lebo, who takes most of the responsibility for the household. In 2019, he moved to Pretoria to look for a job, and within the social network of the Trust found a place to live and a job as junior manager.

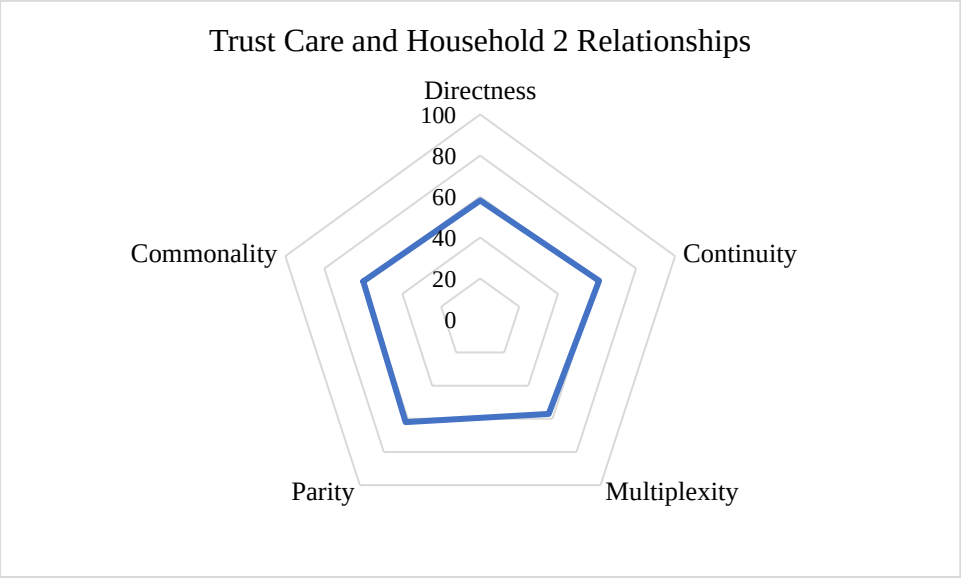
The relationship between Lerato and the Trust has been challenging. She fell pregnant in 2013 and never finished matric. Lerato did not adjust well Pretoria Hospital School (for pregnant teenagers) and the Trust supported her while she reintegrated into the school at home. She did not bond with her baby and the grandmother of the baby became the main caregiver of the baby. In 2016, Lerato was forced to leave the house after a fight with Khosi. The Trust initially supported Lerato by paying for her rent and groceries, but the Trust withdrew payments when Lerato broke their contract and agreements. In 2019, Lerato dated someone who wanted to marry her. It did not work out, but she fell pregnant and needed support. The Trust facilitated a meeting on 18 January 2019 between Lerato and the household. They agreed that she could move back, and they built an additional room for her and the baby. The relationships between Lerato and the Trust and between her and the household have improved significantly. She joined the focus group on 16 March 2019, soon after the birth of her baby, and is taking more responsibility for her child. During the focus group (16/03/2019) Lerato shared,

> "My family was a broken family. Then the Trust helped us and then we get together. They have been with us since I think it was 2009 and they are still with us. And they have never given up on us (*looks at her baby as she says it*). I made so many mistakes and they have given me so much."

Tsebo is the youngest brother in the household who did an interview and participated in both the relational questionnaire and focus group. The founder of the Trust, Richard (29/03/2020), describes him as "bright", "intelligent" and "gifted". He is the only person in the household with matriculation exemption (a legal requirement for first-degree study at a South African university). In 2016, Tsebo received an offer from the Trust to relocate to a commune at a church in Pretoria as part of a discipleship course and skills training programme. Tsebo did not adjust well to the new environment. He struggled relationally, was distracted and went into a psychogenic coma (a state of unresponsiveness without organic cause). He was sent home by the Trust. In 2018, he started studying through the University of South Africa. As a result of financial constraints, the Trust decided that it would be best for Tsebo to stay at home and travel to the Trust offices during the week to study. The Trust paid for the first year of Tsebo's studies and gave him office space and internet access, support from a psychologist, social worker and academic mentors. Up to date, Tsebo has not passed his first year of university, but earns a small income from the Trust as part of their communications team.

Below are the average scores of the Trust care team and the members from household two who filled in the questionnaire (Sechaba, Lebo and Tsebo).

Figure 4: RPF Trust Care Team and Household 2



A combined score shows that the average of the relational measurements is mostly around 40% and 50% between the household members and the Trust care team. The Trust (source document on compiled history and overview of the James 1:27 Trust 2019) describes household two as "dynamic and resilient", but due to the constantly changing nature of their circumstances and realities, "many of the children are suffering from PTSD or anxiety"… "the family struggles with openness and communication and as a result the children are often left unguided and burdened". The relational results between the Trust care team and the household reflect the overall sense from both parties that it has been a difficult relationship with mixed results. The Trust has experienced many crises with individuals in this household, but in the last two years, the collaboration and synergy between the Trust and the household, as well as relationships within the household, have improved. Sechaba commented in a meeting (15/03/2019) after moving back into the house,

> "Ever since I've come back… I have seen something different. We are working towards something. We can at least share some ideas and views and sharing the foster grants that we are getting. With [*oldest brother*] our relationship is not that much effective because we don't share anything except greeting each other."

6.2.3 James Trust and household 3

The Trust also became involved with household three in 2009, through the same community-based organisation as in the case of household two. Household three consists of Kabelo (oldest brother), his wife, two siblings (Dineo and Khabane) and seven children. Three of the seven children are from their deceased sister. Dineo moved out of the house with her two children in 2015 and is now living with her partner and father of their children. Khabane moved to Pretoria in 2016.

In household three, there are members with positive relationships with the Trust and others with more difficult relationships with the Trust. Dineo moved out of the house in 2015 after a fight with Kabelo and her sister-in-law. Since then, the Trust has mostly had contact with Dineo and Khabane. When Dineo continued to get support (such as financial support, groceries and educational support for her children) from the Trust, the impression in household three was that the Trust was taking sides between Kabelo and Dineo. The fight happened in 2015 and

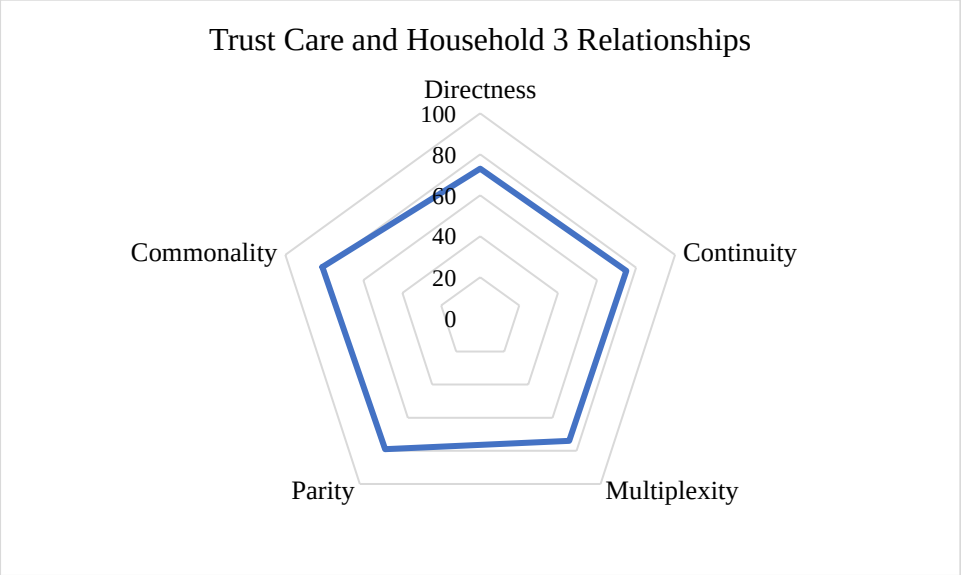
Dineo is still not talking to Kabelo and her sister-in-law. Dineo is a teacher at a crèche in her community while she is studying teaching and she has also done an IT course. In 2018, Dineo asked the Trust for a loan to buy land, which started a process of participation, frequent contact, building trust and sharing the financial risk.

In 2016, the Trust gave Khabane an opportunity to join a mentorship programme at a church in Pretoria and to develop his musical skills. Khabane relocated to Pretoria from his household and community during his mid-twenties. Before the "intervention", Khabane was involved with friends who did not have a good influence on him. He failed his final year of high school but was very passionate about music. Through the Trust's social networks, he is currently pursuing a career in music. He is mentored by a well-known conductor; he is also part of the worship band at a church and a youth leader at the church commune where he is living with young adults and sharing possessions and responsibilities with others. Khabane gives music lessons in poorer communities and had the opportunity in 2019 to go to Germany with a children's choir as the leader. Khabane has positive relationships with Kabelo's household, with Dineo and with the Trust. The conflict within their household and the implications for the relationships between their brother's household with the Trust have been difficult for Khabane. During the focus group (16/03/2019) he shared,

> "Now it's me, I'm here, nè... The Trust helps me, but they can't reach those ones at home. And the separation between Dineo and [*household surname*] is still a challenge to me because when I go home for me, I feel like I have to choose where to go, and I can't do that… But the thing is I am this side, but I don't want to be alone this side."

The below results are from the ratings between the Trust care team with Dineo and Khabane, since they were willing to participate in the relational questionnaire.

Figure 5: RPF Trust Care Team and Household 3



The results show that all parties view the relationship as positive, with average scores between 60% and 70% for directness, continuity, multiplexity, parity and commonality in the relationship between the care team and the household members. The results may have been different if the oldest brother also filled in the questionnaire, but he was not available to do so.

6.2.4 James Trust and household 4

In 2000, household four was taken under the care of a foundation facilitating community-based care and support for "orphans and other vulnerable children within a family-based care model" in KwaZulu-Natal (KZN), South Africa. This was before the Trust was established in 2004. The household consisted of three young boys when they were taken under the care of the foundation, Solomon (oldest brother), Bheka (second oldest) and Kgabu (youngest). The Founder of the Trust, Richard, had contact with the foundation's CEO, who visited Paris for fundraising when Richard was still a diplomat. Richard wanted to demonstrate virtual adoption by linking sponsors through the foundation (as the caregivers) to a household. When the Trust was established in Pretoria, household four was in Pietermaritzburg in KZN, over 500 kilometres away.

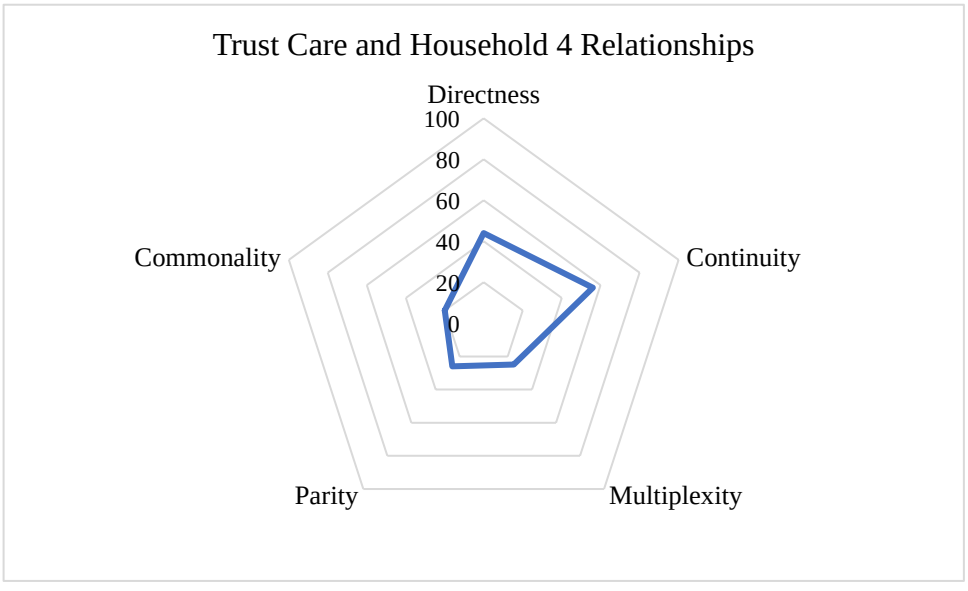
The Trust supported the household with basic needs, accessing grants and social support and getting a caretaker to live with them. Other interventions included emotional and psychological

support and mentoring. The Trust helped Solomon to start a business by providing him with business guidance and equipment, but he wanted to own a shebeen (an informal licenced drinking place in a township) and the business failed. The Trust visited the household intermittently and the household also went for occasional visits to Pretoria. The care organisation in KZN had limited capacity and the Trust was geographically too far away to know what was happening. Although the Trust built a strong sponsor base for the household with consistent funding, the distance remained a challenge. The organisation in KZN who supported the household also had limited capacity, which has made it difficult for the Trust to maintain involvement both relationally and towards holistic care.

The boys are now grown up, but there is limited contact between the brothers. Kgabu is still in high school and struggling to finish school. A Trust report states that foetal alcohol syndrome may be the reason that he is struggling academically. The two older brothers are both addicted to alcohol and unable to keep a job. There is a case of culpable homicide against one of the brothers, who allegedly murdered his girlfriend while drunk.

The diagram below shows the combined relational scores between the Trust's care team and household four. The Trust has lost contact with Solomon; thus, the relational questionnaire was conducted between the Trust and Bheka. However, due to the distance, Bheka was not able to do an interview or participate in the focus group.

Figure 6: RPF Trust Care Team and Household 4



The combined scores show that both parties in the relationship view the relationship negatively. The highest scores are for directness and continuity but even these results are below 40%. The relational gap is not only due to distance or limits to resources, but a gap in contact, context and understanding. After the Trust had a meeting with members of household four in KZN (03/08/2018), it was evident that the geographical distance, as well as language and cultural barriers between the Trust and household members, factored into how the relationships were scored. Underlying conflicts in the household, financial disputes between the Trust and how Bheka spent the money given to the household, Bheka's behaviour and alcohol abuse were contentious issues of discussion. The household is "entangled" in many relationships and the Trust remains too much of an outsider to fully understand these "entanglements". The household seems trapped and has fallen into the pressures of their daily realities despite the Trust's attempts to bridge the gap through their interventions.

It is clear from the above figures that the relationships between the care team and the households differ significantly. The overall scores between the Trust care team and household one (figure 3) and household three (figure 5) are positive, while scores are lower for the relationship between the care team and household two (figure 4) and very low scores were given by both the care team and household four (figure 6).

The above findings will be explored in more detail below with two prominent threads: the first is how the giver and receiver of resources relate and the second is to examine the participants' responses within a cyclical process of development.

6.3 Relational dynamics within development interventions

The above provides the context to further explore the relationships within development between the Trust as the "giver" and the households and its members as the "receivers" of resources. There is extensive literature on the difficulty of a "giver" and "receiver" relationship in development interventions (as discussed in section 3.4.1 of chapter three and section 5.3.3 of chapter five) and the risk of creating paternalistic relationships. Even with good intentions, paternalism can occur when the so-called development professional (seen as the expert) manoeuvres the receiver of resources toward a goal that the professional considers the best and where empowerment processes are mandated within predetermined frameworks (Kvarnsröm, Hedberg and Cedersund 2012). Paternalism also comprises communication of benevolence,

which means the less powerful party is not in the position to challenge the social relationship between the *empowerer* and *empoweree*. The *empoweree* may instead feel that the *empowerer's* benevolent act demands gratefulness, therefore, an acknowledgement of the *empowerer's* superiority as legitimate. A major problem with the exchange is that it perpetuates a model that affirms the strength of the giver and the weakness of the receiver. This tends to stimulate pride in the giver and humiliation in the receiver (Lindner 2006; Statman 2000).

Within the relationship between the giver and the receiver lies the challenge of resources and choices. Those with resources are often seen as those with the power to decide "who gets what, why and how", and raises questions of power asymmetries and whose reality counts (Chambers 1995). The giver of resources is in a more powerful position to set the conditions with the choice to withdraw resources when the receiver does not comply with the conditions. There are assumptions, ascriptions and messages evident within the interaction between the giver and receiver of resources, independent of how unaware or unintentional these may be (Weidenstedt 2016).

On the one hand, the Trust is the more powerful party who sets the boundaries and conditions within their "transactional" component to holistic care (chapter five, section 5.3.1). It confirms literature suggesting that the transfer of resources is largely dependent on expectations and what is communicated by the powerful party with the resources (Weidenstedt 2016). On the other hand, there is also a deeper and more nuanced understanding of 1) the Trust's position as "givers" of resources, and 2) the Trust's perspective on choice in the relationship.

The first relates to how the Trust experiences its role as a "giver" of resources. In a very open and frank interview with Richard (29/03/2019), he spoke about his own humiliation when he had to ask for funding for Lesedi when she had to rewrite matric in Pretoria,

> "The college that we found was extremely expensive, it was about R15 000 and to raise that amount within a week was not at all easy. So, I went to a wealthy friend of mine who I had never asked for money before, for the Trust. After having set up a formal appointment with him, I got to his offices and was informed that he had gone to play golf and that I had to 'pitch' to his staff. This left me feeling like a Tupperware salesman, embarrassed and humiliated. So, I phoned a good friend of mine who runs [*name of organisation*] and told him

> what had happened. And in his wisdom, he encouraged me to take the money and told me that I need his money, Lesedi needs this money and her interests are bigger than my pride and embarrassment."

Richard also experienced humiliation and even though the money was raised for Lesedi's education, his pride and embarrassment are a much more realistic picture of what is experienced by receivers in development interventions. These experiences and feelings can inform a relational economy where relationships are reciprocal to the extent that the giver also needs to be a receiver to truly understand the implications of the power dynamics and potential pride and humiliation of a giver and receiver relationship.

The second thread relates to the Trust's understanding and experience of choice within the relationship between the giver and the receiver of resources. As explained in chapter five, section 5.3.1, the Trust's Social Change Theory has two components, the "transaction" and "transformation", as part of their "dream, dance and choice" philosophy. The "transaction" includes contracts and agreements between the NGO and the household members, which are clearly defined within the expectations of a "giver" and a "receiver" in an exchange.

The Trust's "transformational" component is not determined by the "transactional" agreements but premised on "relationships of grace and love that respect the choices that individuals make" (source document on compiled history and overview of the James 1:27 Trust 2019). There is freedom and choice both in what is negotiated within the "transactional" exchange and the decisions that parties make in the "transformational" component. The "transactional" component of the Trust is dependent on resources and the capacity of the organisation to support households based on contractual conditions. The Trust discusses with household members how the resources should be spent and there is room for negotiation. In Lesedi's case as an example,

> "And so, we had a budget for her, and we decided how much money we had. That decision was based on our ability to raise the money. But once the money was raised, there was participation and inclusivity in discussing with her how she wanted to spend the money. She decided what she was going to buy. So, from a very young age she was already the decision maker about how to allocate the funding" (Richard 29/03/2019).

Regarding resource constraints and negotiations, the Trust views the choices of each person as critical in development:

> "It's about power and the power is what is the problem. Where does the control lie? I think for me the revelation was that the family sits with the power, we don't sit with the power. They think we have the power, but the truth is they have the power because the power lies in their choices. They can ruin the relationship, or they can build it by the choices that they make and we're victims in their choices. We are either success partners or we are victims, there is no in-between. So, I can invest all my life in a child and in a family and in the end, they can choose to destroy their lives and I go through the pain and the horror of that and I am a passenger in that car. I'm not the driver, I don't have control, I'm purely present" (Richard, focus group 16/03/2019).

The Trust views power as the freedom of each person to choose and to respect those choices. Once there is agreement on the transactional exchange and the negotiated conditions under which resources are provided, all parties (including households, the Trust and also the people in society who pay and sponsor the care) make choices that need to be respected.

The table below, which is taken from the background and context in the previous section, offers an example of this. It shows how with a crisis or crises in the life of a household member, both the Trust and the individual respond, and it shows the outcomes of those responses. Below is a very simplified illustration of crises-responses-outcomes to highlight the reciprocal responses to a crisis and its relational outcomes. The relational outcomes simply indicate whether the responses of participants led to positive (closer proximity) or negative (strain, distance or break) change in the relationship. The chronological order is the sequencing of events, for example, response (a) leads to outcome (a), which then leads to response (b) and as a result to outcome (b).

Table 3: James 1:27 Trust crisis, response and relational outcome

CRISIS	RESPONSE	OUTCOME
LESEDI		
Falls pregnant Fails matric	a) Trust and Lesedi agree that she moves to Pretoria to rewrite matric b) Lesedi does not adjust well where she lives – conflict with Trust	a) Lesedi is closer, which deepens the relationship between her and the Trust b) Strain on the relationship
	c) Lesedi passes matric and moves back home. She takes initiative on her own – job, driver's licence d) Both parties open lines for communication, ask forgiveness	c) Limited contact with Trust (for six months) d) Closer proximity in the relationship
KHOSI		
Business fails Breach of trust with the Trust after dishonesty with finances	a) Trust initiates restorative justice. Khosi declines	a) Break in the relationship
LEBO		
Falls pregnant Fails matric	a) Lebo takes responsibility for household as caretaker a) Trust supports her as caretaker a) Trust pays for her to rewrite matric and gives educational support	a) Closer proximity in the relationship
LERATO		
Fails matric Conflict with Khosi – she is chased out of the house	a) Trust supports Lerato with rent and food within contract b) She does not adhere to the contract. Trust withdraws support	a) Closer proximity in the relationship b) Distance in the relationship
She falls pregnant	c) Lerato contacts Trust. Process of negotiation with household two for Lerato to move back. Repaired relationships	c) Closer proximity in the relationship
TSEBO		
Relocates to Pretoria but does not adjust well – problems develop where he lives	a) Tsebo goes into a psychogenic coma b) Trust sends him home	a) Strain on the relationship b) Distance in the relationship
	c) Tsebo decides to study. Trust supports decision – pays for first year and provides additional support d) Tsebo fails – both Trust and Tsebo disappointed	c) Closer proximity in the relationship d) Distance in the relationship
	e) After meetings and conversations, Trust supports that Tsebo continues studying but cannot continue to pay. Tsebo starts working as part of the Trust's communication team.	e) Closer proximity in the relationship
DINEO		
Conflict with Kabelo and sister-in-law. Dineo moves out	a) Trust continues to support Dineo	a) Closer proximity in Trust-Dineo relationship b) Break in Trust-household relationship

	b) Deepening conflict between Dineo-household and Trust-household	
KHABANE		
Fails matric Unemployed	a) Khabane is negatively influence by friends. Trust contacts and meets with him b) Khabane agrees to relocate to Pretoria for music training and discipleship. Becomes a leader and starts working and volunteering	a) Distance in the relationship b) Closer proximity in the relationship
BHEKA		
Fails matric Intermittent work Struggling with alcohol abuse Causes conflict in the household	a) Trust finds a mentor for Bheka and Kgabu in KZN and meets with household on 28 July 2018 in KZN. New agreements on how resources will be spent, commitment to work on challenges b) Difficult for both parties to meet and interact due to geographical distance	a) Closer proximity in the relationship b) Distance in the relationship

The interpretation of the responses in the above table vary significantly. Some responses from both the Trust and the household member initially leads to distance in the relationship but later to closer proximity (such as Lesedi, Lerato and Tsebo). Other responses to a crisis can lead to a break in the relationship as a result of the household member's choice (Khosi did not want to continue with a restorative justice process). Another outcome is as a result of choices made by both the Trust and household members. The Trust supports Dineo and Khabane, but there has been a distance and disengagement in the relationship between the Trust and the rest of the household. From conversations with Khabane, he explains that Kabelo is angry at how the Trust has unfairly shared the money and resources between Kabelo's household and Dineo. But the Trust does not want to give resources without the relationship. The conflict and different views have led to a breakdown in the relationship between the Trust and Kabelo. Geographical distance between the Trust and households may not be the primary reason why interventions from the Trust fail (the distance between Lesedi and the Trust was important for Lesedi's independence), but proximity seems to allow for more disappointment on both sides but also more opportunities to reconnect. Distance creates long periods without being able to resolve issues due to the lack of connection (such as the case with Bheka) and then there is also insufficient support for the household from people or organisations in Pietermaritzburg.

The above shows some of the dynamics within the relationships. If relations are intrinsic to the very emergence of communities (Englund and Nyamnjoh 2004), then the same can also be said

about relationships as they emerge in development. There are identity formations within individuals, within relationships, within groups as well as within relational partners and group members (Golden et al. 2002). As such, what is significant from the above illustration is that relationships develop and emerge in a crisis and the health of relationships is not necessarily dependent on the success of the intervention but whether the relationship can be sustained in a crisis. In light of this, the following section will explain what participants identified as critical to the "success" of development to deepen the understanding of what sustains development interventions.

As an example of the above assertion, the Trust's relationship with Lesedi has been strong enough to endure many crises because the health of the relationship lies in the connection, the shared story, roots, trust, mutual appreciation and respect, understanding and shared purpose in the relationship. Conversely, the relationship with Dineo and Khabane's household (household three) has been based largely on resources and has not endured. Richard shared during the focus group (16/03/2019),

> "There was no substance to the relationship. It was purely a charity case. That is not the ethos the Trust work[s] with. It's disappointing when you want relationship, but you are perceived as just a resource."

This points us to a deeper understanding of a relational economy where the success in development is not determined solely by human development results, but whether relationships are strong enough and able to hold under the pressure of a crisis and the different choices made in the crisis.

It is also evident from the above that a crisis has a ripple effect and one response may lead to another, which can have either positive or negative implications on relationships and a person's development. Responses and outcomes change as the relational interactions unfold in the choices that the different parties make, and it is always different, unique and within a cyclical process of development instead of a linear movement from point A to point B. This suggests that there is no "one-size-fits-all" in a relational economy.

In chapter two (section 2.2.1), models of development were critiqued for their linear and reductionist approaches to development. One of the earliest and most popular mainstream

development economists, Walt Rostow (1991), influenced thinking of development as a movement from point A to point B (from "traditional" societies through industrialisation to mass consumption). This has further influenced the idea that development on a micro level should move people from poverty to "prosperity" through development interventions. The above findings show that development moves in cycles instead of in a forward trajectory from point A to point B.

Development donors and practitioners often repeat the same linear thinking and expect different results, which are embedded in quantity, numbers, growth, technical expertise and improving programme design. This study finds limited legitimacy for linear or dualistic tools to analyse development, but rather found evidence that relationships between the Trust and households are influenced by nonlinear and unbounded factors. The theoretical positions presented in section 2.2 of chapter two (classical, structuralist, classical Marxist, neo-Marxist and neoclassical), which seek to explain the challenges and solutions to development, do not capture the complexity of relational dynamics.

When the above is considered, the interactions and responses between the "giver" and the "receiver" are largely based on how the relationship is perceived between the two parties. The following section will, therefore, focus on how the different parties view the relationship. This is done through an analysis of the focus group with the Trust and household members, with whom the results of the RPF were shared.

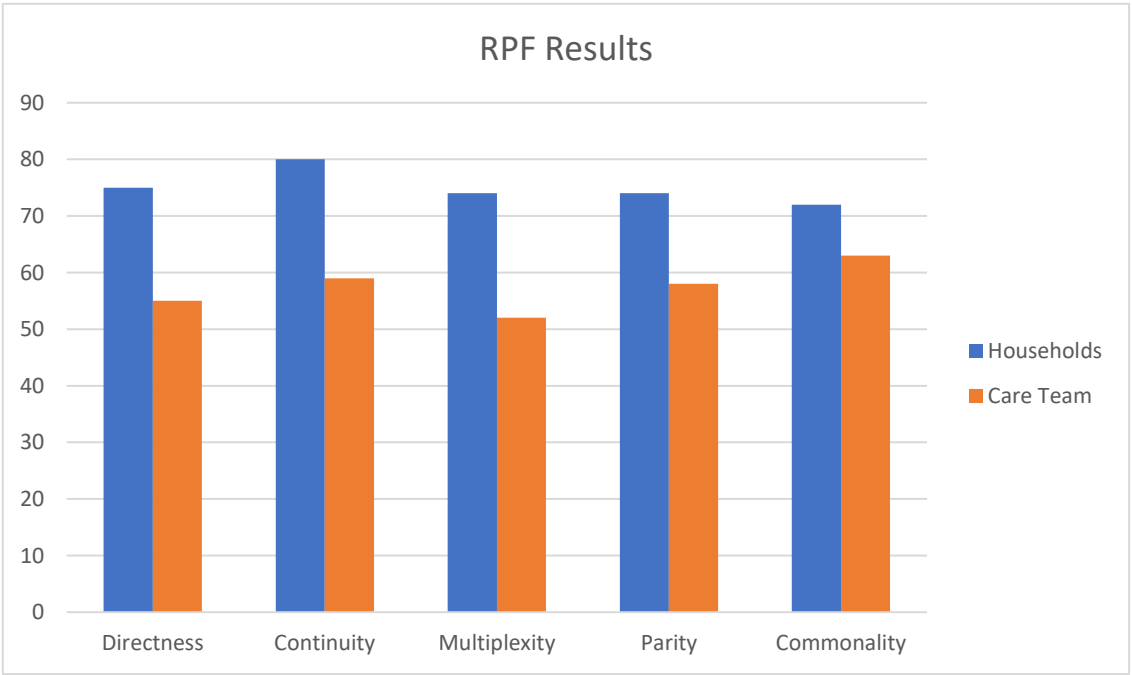
6.4 How the perceptions of relationships in development can inform a relational economy

On 16 March 2019, a focus group was conducted. Participants included staff from the Trust, the founder (Richard), the CEO (Mark) and the social worker (Samantha) and household members who completed the relational questionnaire (Lesedi, Sechaba, Lebo, Lerato, Tsebo, Dineo and Khabane). Bheka could not join due to distance even though he completed the RPF questionnaire. Lerato did not complete the questionnaire since it was conducted during a time when it was difficult to get access to her, but she joined the focus group. Lerato did not participate extensively during the focus group, since she had to look after her newborn baby, but her presence was significant given that she decided to join and came with other members from her household.

The focus group took place after extensive research on the Trust, interviews and recordings with key people within the Trust and after analysing the preliminary results from the Relational Proximity Framework questionnaire scores. The RPF results are based on the five domains and drivers, as discussed in section 3.3 of chapter three, namely communication (directness), time (continuity), information (multiplexity), power (parity) and purpose (commonality). During the last of the four sessions in the focus group (as explained in chapter four, section 4.4.3), the RPF results were shared with the group.

The results shared during the focus group were the same as the results in section 6.2 (figures 3 to 6), but it was shared as a graph (figure 7 below) to show the differences in how the Trust and household members scored their relationship with each other. Graph 7 shows each driver with a score from the Trust care team (founder and social worker) in orange and the scores given by household members in blue. Each person completed a questionnaire on another person. For example, Samantha as social worker scored her relationship with Khabane as a member of household three, and he did the same with his relationship with her as the social worker. The same was done between the founder and household members. To ensure the confidentiality of participants, the scores were shared in the following way:

Figure 7: RPF Households and Care Team



The meanings behind the drivers were explained to participants in the following way. The first driver (directness) is about the quality of communication and how it builds a sense of connectedness. Do the ways in which you communicate (face-to-face, email, text, and so forth) help avoid misunderstanding and create a sense of connection? The second driver (continuity) is thinking about the "time" and "story" of a relationship. Do your various interactions over time build a sense of momentum, growth, stability or ultimately a sense of belonging and loyalty? The third driver is about "knowledge" (multiplexity). "Knowing" in this sense is about the breadth of understanding of the other person's challenges, skills, talents, resources, capabilities, needs and motivations. Both parties should feel accepted and appreciated to participate in the relationship without anxiety. Building knowledge and understanding happens over time, through a variety of sources and contexts. The fourth driver is about power and fairness (parity), how it is used and experienced and to what extent authority encourages participation, promotes fairness and conveys respect. The final driver (commonality) within RPF is about purpose, values and goals, and the degree to which they are shared in ways that bring synergy and motivation to a relationship. How deeply rooted are your intentions or are you pulling in different directions (Ashcroft et al. 2017: 34)?

The results were then briefly explained, and the researcher highlighted the differences in how the Trust care team and households scored the relationships. The differences are bigger for directness (20%), continuity (20%) and multiplexity (21%), while the difference for parity drops to 15% and is lowest for commonality at 8%. These scores will be analysed in more detail in the following section together with what participants shared during the focus group.

6.4.1 Development viewed relationally

Section 6.3 of this chapter tried to show the importance of understanding how relationships develop and emerge and whether a relationship can be sustained in a crisis. This section will explore how participants view the relationships and how the perceptions and value placed on the relationships have sustained efforts of holistic development. The themes that will be explored that could inform a relational economy include the following: development is not just about resources but also include family, belonging, truth, learning, forgiveness and honesty. When these themes are considered in more detail, it further suggests that a relational economy is "messy" and requires different understandings of pain and interdependence in development interventions. The section below therefore seeks to understand how participants view and have

experienced the relationship between the Trust and household members, while the two final sections will focus on how these experiences have shaped development in practice.

6.4.1.1 "Sometimes we don't need money"

Before sharing the RPF results with participants during the focus group, the participants were divided into groups and shared how they viewed the Trust-household relationships. Two of the groups shared that it is like,

> "A journey through life where there are many obstacles, but it is overcome through support and care to grow, learn and develop." (Tsebo)

> "This is a tree with roots which requires nurturing, opportunities and perspective and you have to ask yourself 'who are you, what do you want in life, what's your purpose?" (Khabane)

Resources to address human development needs (such as education and health) are important, but the above shows that it was not the primary focus of participants. Tsebo, for example, lists "grow, learn and develop", which relates to human development, but he views it relationally. Khabane's feedback from their group links development to questions about identity, life and purpose. Human development and even the understanding of education, learning and other development indicators are tied to the significance of relationships.

During the six-hour focus group, the Trust staff mentioned the word "money" twenty-one times, while household members used it ten times and five out of those ten times household members used the word to explain why it is not important. For example, the quotes from participants all mentioned that finances or money are not always important and then suggest that they have valued personal care and investment, motivation and presence, among others, as shared below,

> "Sometimes we don't need money, presents or all of these goodies and things that money can buy. We just need: are you okay, are you fine? … that someone is caring about you… somebody is thinking about you at that moment… that

someone is phoning you to check that you are okay. You just need to know that I still love you." (Lesedi)

"When you feel love, you also care and provide, not money or food, but by your presence, giving me some motivational words, you just come and give me some advice. Out of love, we get peace, that is where we get a lot of our relationship, friendship and we connect." (Khabane)

"It's not just about the financial but like teaching you to be independent, and just want to see you successful and being a good person in society. They go an extra mile investing emotionally, spiritually in ways other organisations would not do. They go through everything with you. They don't just stand and watch you learn, actually they want to help you learn and go with you every step of the way. They just go with you." (Tsebo)

"But what I got from the Trust was, 'why didn't you tell us because we were going to help you with finances maybe to go to the hospital or maybe just to comfort you while you were there'. So that is the expression of goodness that I've saw…" (Sechaba)

Considering feedback from the focus group, a relational economy, therefore, is not only about resources. Households identify with the Trust beyond tangible needs and individual capabilities by identifying factors that support relational capabilities. The word "commitment" was mentioned six times during the focus group. Household members such as Sechaba, Lerato, Tsebo, Khabane and Lesedi used words including "they have never given up on us" and "they never rejected us and have trust in us"; and Sechaba said, "they are always there"… "guiding"… "involved"… "I'm being loved, taken seriously, I'm somebody" (Sechaba). As discussed in chapter three, section 3.5, the value placed on social relationships and involvement can enhance a person's sense of dignity and respect (Cahill 2006; Deneulin 2006; Ricioeur 2006) when it contributes to a deeper relational understanding of "commitment", "love", "friendship", "being a good person in society" or as "expression of goodness" (as was shared during the focus group).

Human development that is tied to relational capabilities pay closer attention to how those within development explain and understand development, as well as their use of terms and language that is often not considered in current development practice. If resources in the form of money are not viewed as the most important factor within development, it raises the question of what aspects of development are viewed as important in sustaining development efforts? Chapter three, section 3.4.1 discussed the problems of "buzzwords" in development and chapter five, section 5.3.3 provided a critical overview of the terms and concepts that the Trust uses in its conceptual framing. However, in practice, the participants used language and terms that speak to a relational economy and relates more closely to literature on relational thinking within African thought (discussed in chapter two, section 2.2.1.3) than the Trust itself or than is expressed even in the alternative development discourse. Other themes that emerged include family, belonging, truth-telling and honesty that has been built over a long period between participants.

6.4.1.2 "So it's like a brand, a family name, a clan"

Participants described the Trust and household relationships as part of a "bigger family". The word family was mentioned 60 times in the six-hour focus group. During the focus group, nods and sounds of agreement were given when Khabane said "we have journeyed together" and Richard positively said, "there is a history" between the Trust and household members. Richard mentioned early in the day that the idea is to build a family, "So it's like a brand, a family name, a clan" and further elaborated,

> "We do have sponsors who have been giving to the Trust for 12 years without missing a month. Because of the relational… they know this is my family… they have continued giving even when things have gone bad and pear-shaped, because emotionally they were committed. So, they kept giving when we were in a nightmare because they believed in the dream. That is fantastic to show if you can build relationships at a family level that is cross-geographical and cross-boundary, then you have the beginnings of a sustainable model for vulnerable family care."

When participants were divided into three different groups and had to draw a picture of what the Trust represents to them, one group specifically spoke about family. “Here we are, entering into the aeroplane, sitting with my James Trust family and community to a new life” (Dineo).

The idea of family has created a strong sense of commonality in the relationship between The Trust and household members. In the RPF results in figure 7, there is only an 8% difference between how the Trust care team and the household members view commonality in the relationship. This means that intentions, purpose, values and goals are shared in ways that bring synergy and motivation to the relationship. It therefore suggests that the sense of being part of a family in a development intervention can have important implications for how so-called “givers” and “receivers” relate, which takes us back to the argument made in section 6.2.1 that how a relationship is experienced will determine the extent to which development efforts will be “successful”. This supports literature on the importance of the sociality of a person and the argument that more value should be placed on persons as inherently embedded in and constituted of social relationships. Belonging to a diverse “intergenerational family” is an important component of human identity, self-determining freedom and as precondition of healthy, moral and social development (Cahill 2006).

6.4.1.3 “You feel this sense of belonging”

The value placed on family also extended to how participants experienced belonging in the relationship, which is reflected in how participants scored parity (15% difference) between the Trust and household members in the RPF results (figure 7). This indicates that both parties experience a fair level of participation, fairness and respect in the relationship. During the focus group, the facilitator[6] asked that all the participants rate how they feel about the statement, *I can be myself*, in relation to Trust-Household relationships, and all the participants scored above 7/10. When the facilitator asked everyone in the room why the scores were so positive, a prominent answer was that participants felt valued and respected by the other party. Khabane said, “we pay attention to each other”. Richard commented that “there is an effort from both

[6] As explained in chapter four, section 4.4.3, a qualified coach facilitated a focus group session between participants, since the researcher is too involved and known within the Trust to facilitate a discussion between the secretariat and household members of the Trust. The researcher was present but did not participate during the focus group and only observed and took notes.

sides to ‘show up’ in the relationship”. After the feedback from all the participants, the facilitator remarked that “there is sense of awareness in the group that ‘we are different, but that’s okay’”, to which there were many nods of agreement. Tsebo mentioned “you feel this sense of belonging” four times and elaborated with words such as “I am in a secure space”; “Here appreciation is a common thing”; “appreciated and valued”; and “there is a platform of a strong bond”.

Words such as belonging, appreciation, value, bonding and paying attention can be situated in language and understandings in African thinking on the values that should support the functioning of groups and societies. As explained in chapter two, section 2.2.1.3, the above reflect much deeper understandings in African philosophies of social relationships on which societies and economies are structured and include values such as reciprocity, responsibility, recognition, community, sense of belonging, redistribution, respect for humanity, shared values, social harmony, interconnectedness and unity (Munyaka & Mothlabi 2009; Ramose 2003).

6.4.1.4 “We do have truth-telling”

Belonging, however, does not mean that there is complete harmony but is rather linked to how continuity in the relationships have created a deeper sense of belonging to deal with issues and challenges in ways that are difficult but honest. The RPF results (figure 7) show that continuity was scored high by both household members and the Trust team. High continuity in the relationships relates to stability in the relationship, which means there is also room to make mistakes, for learning together and truth-telling. During the focus group, five household members said that in the relationship with the Trust, “There is room for mistakes”. Richard explained truth-telling as,

> “We do have truth-telling. It’s a culture. And also, we don’t patronise. So, I don’t patronise Tsebo, I treat him as a man. Even when he was a young boy. A refusal to patronise is very important because what it does is it says I respect you.”

Khabane described his experience of truth-telling in the following:

> "They go straight to the point and say 'you know what, this is what you have done and then these are the consequences'. So, you have to grow, and in that way that is how you see that these people are caring and they have that love to me. I know I will be angry… But after some hours I realise, no … I don't have to repeat the mistake."

The above suggests that continuity built over time in the development relationship allows greater levels of truth but in a space where mistakes can be made because the sense of belonging and family is embedded within the relationship. The importance of continuity in a development relationship contributes to understanding aspects of development that are often neglected in the study of development and will be discussed in more detail in section 6.3.3.

6.4.1.5 "We carry resources and there are differences in power in the relationship which we need to be honest about"

Together with truth-telling, participants also valued honesty in the relationship between the Trust and household members. The CEO of the Trust, Mark, was open during the focus group about the challenges of the "giver" and "receiver" relationship between the Trust and household members:

> "Whether we speak about it or not, there are power and resource barriers which I think changes the nature. It's easier for us to be completely honest with you than for you to be very honest and bold with us. I think that is the word that stood out for me, the respect and fairness is there but the boldness can be hard because there are differences. We carry resources and there are differences in power in the relationship which we need to be honest about, that they are there, and it can affect how that relationship works."

During the focus group, Dineo spoke about how she struggled with the constant changes in Trust care workers. "We had different caregivers. We didn't know who to share our problems with and who to talk to". Lebo was frank about not wanting to get married and the pressure that the Trust placed on her to do so. Lesedi told Richard that he can be "harsh sometimes" and he replied with "we must work on that harshness". Tsebo was able to share one of his major disappointments with the Trust. Tsebo explained that he felt "knocked out" when Mark and

Richard had a long discussion with him during a household meeting (on 15/03/2019): “I felt like, I know I made a mistake and was already fixing my mistakes and I felt that the Trust saw its own perspective and did not see what I was trying to do”.

The willingness to engage with such levels of openness is significant, since relationships arise out of acting and speaking together (Phelps 2006). Ultimately, the meaning of personal action cannot be reduced to the intention of the individual agent, but to actions in social networks (Deneulin et al. 2006). The above explanations and experiences assign different values to the meaning of development and sees it as embedded in relational values such as family and belonging. These values emerged within a development context where people are “acting and speaking together” to achieve certain outcomes that may be unpredictable because the choice and actions within social networks are unpredictable. But within these networks, there are identity formations (Golden et al. 2002) that have occurred within and between group members. The following sections will attempt to explain identity formations that have been formed between participants and their implications for the study and practice of development.

6.4.2 “The mess is in the relationships”

Section 6.2.1 explored the role of relationships when a crisis occurs in development, but the above themes provide deeper understandings of what is “necessary” to sustain development. The above section identified themes that are not just aspects of development, but that “hold” development together. Healthy relationships are not simply dependent on whether human development interventions were successful or whether positive relationships are formed. Rather, the health of relationships is dependent on whether the understanding of family, belonging, truth, honesty, trust, roots, respect, parity, appreciation, purpose and other relational aspects (identified in the above section) are deep enough to hold under the pressures and complexities of holistic development.

More contextually, are the understandings and meanings attached to the relationships strong enough to hold up under the complex network of historical, generational, economic, gendered, spatialised and racialised relations in a South African context? This requires a much deeper understanding of identity formations within the relationships of holistic development in the South African context.

Nuttal (2009) makes a convincing argument for the notion of "entanglement" to explain South Africa's cultural identity from a literary perspective and it is also a useful definition to describe the "entanglement" of relationships in development

> "being twisted together or entwined, involved with; it speaks of an intimacy gained, even if it was resisted, or ignored or uninvited. It is a term which may gesture towards a relationship or set of social relationships that is complicated, ensnaring, in a tangle, but which also implies a human foldedness. It works with difference and sameness but also with their limits, their predicaments, their moments of complication. It is a concept I find deeply suggestive for the kinds of arguments I want to make in relation to the post-apartheid present" (Nuttal 2009: 1).

These relational "entanglements" can also be used to describe the relationships within the Trust. The Trust's care model includes professional social workers and psychologists who have been working with households over the years. There have been several care workers and mentors who have been involved professionally in the care. However, the Trust also has some unconventional practices that are not expected in NGOs and care-based organisations. The Trust follows standard procedures to protect children, which includes for example signing of indemnity forms by those working with or for the Trust (all staff and volunteers included). However, more unconventional is the way household members relate to the Trust and the social network of the Trust. The Trust's idea of "closing the gap", "building bridges" and "creating family" has led to more personal interactions between household members and the Trust's social network. During the focus group, Richard described the Trust's approach in the following way:

> "We made a decision as an organisation not to create clients but to build family. So, nobody leaves the Trust ever, you stay in the Trust for your whole life..." "We are a relational organisation… If we don't get the relationships right, we are going to perpetuate a model that does not work."

As part of the care, the Trust social workers and care workers visit household members for check-ups and write reports. But these interactions extend further, where partners, friends, families and stakeholders of the Trust have also been part of mentoring, direct support and

counselling, helping with driving lessons and various activities, going to picnics and spending time together. The care team of the Trust has changed frequently over the years, but the founder is the "relational constant". In times of crisis or for visits, there have also been occasions where household members have stayed with Richard and his wife and children in their home. These social networks have led to different exposures and experiences for both the Trust's network and the household members. The exchanges and different interactions have also meant that there have been opportunities for all sides to learn from others in building a more well-rounded understanding of others.

As a result of these relationships built over time, it has led some of the household members to call Richard "Dad". In one of his comments, Richard said about his relationship with Lesedi,

> "Our relationship continues to grow despite the Trust not always able to provide for her sufficiently. It is now at a point by which she spends Christmases over at our house, comes over for lunch and has even started calling me Dad. It is however a little bit awkward for her, because she has always called me Uncle Richard, so she's torn – so sometimes she will say Uncle and other times she says Dad."

This is an example of an identity that has been formed within these social networks between the Trust and household members (Golden et al. 2002). In development work and practice, the above is problematic and can be viewed as unprofessional in the NGO sector as the providers of holistic care and not the parents or guardians. However, the above is also a challenge to development studies and practice. In chapter two, section 2.2.1.3, literature on the concerns of the ethnocentric nature of development and social work in African contexts challenged dominant development and social work models and contended for development research and practice within African contexts, realities, understandings and experiences (Casimir & Samuel 2015; Ibrahima and Mattaina 2019; Smith 2014).

In the South African context, two important factors should be considered more carefully in development research and practice, as is evident from the data:

1) The African understanding of how people relate is different from individualistic societies. As discussed in chapter two, section 2.2.1.3, many African philosophies have

a much more integrated understanding of the interdependencies of entities with the whole of humanity but built within a cosmological community that has duties and responsibilities to both the physical and metaphysical social world (Setiloane 1978). The dignity of humans is situated in the larger community and the oneness of all life (Nabudere 2011), which is also reflected in the understanding of family relationships. Family ties that bind family members in the extended family structure are so deep and strong that there is not a sharp distinction among relatives of family members like sisters, brothers, half-sisters, half-brothers, cousins, nephews or nieces. The words "brother" or "sister" cover all categories and degrees of relationship and anyone related, no matter how distant or far, is either one's sister or brother (Odimegwu 2020).

Many African languages do not contain equivalents for words such as half-brother, half-sister, niece, nephew and cousin. A person's siblings' children are referred to as the person's own children. The word uncle refers only to a person's maternal uncles and a person's paternal uncles are referred to as their father. Family members are not as compartmentalised or identified with the same degree of specificity as in individualistic and nuclear families (Njoh 2006). By extension, people who are not related are also called "sister" or "brother" and even call someone "Father" even if they are not related but because of how the relationship is perceived, respected and valued.

2) South Africa also has other major challenges that seem to affect the deeper need for a parent role and belonging to a family. South Africa's high levels of income poverty create barriers to parents' ability to fulfil the tasks of parenting. For instance, poverty increases the stress that parents experience when trying to provide for and protect their children, and, by definition, also reduces the ability of parents to provide adequate nutrition and to access good educational opportunities for children.

   Together with this, many families in South Africa are fragmented due to labour migration to seek employment and low marriage rates when men are unable to pay lobola (the bride price) or ukuhlawulela ("damages" or restitution for children born outside of marriage) (Ward, Makusha & Bray 2015). The AIDS pandemic also plays a key role. Children who have lost one or both of their parents due to AIDS-related illnesses, or who are living with a parent who has AIDS, are more likely than other children (including those orphaned for other reasons) to be living in extreme poverty

and to suffer physical and psychological abuse; in turn, poverty and abuse increase the risk for transactional sex in these young people (Ward, Makusha & Bray 2015).

As a result of the major HIV/AIDS pandemic in South African in the early 2000s, many children lost their parents, which has led to an abrupt "break in their storyline" that provides retrospective meaning and sets of expectations for the future. The sense of being part of a story is a major contribution to the feeling of rootedness and belonging that is disrupted with the loss of parents, guardians, older siblings and extended family, as in the case of the pandemic. During an interview with Tsebo (02/04/2019), he describes the devastation of losing his mother and how he felt:

> "Our mom passed away in 2014. It was the worst time of my life. It takes time before the shock sinks in – it took me long to know how to respond. I wondered 'how are you going to survive since she understood me best'. So, I became 50/50 rebellious. I felt alone without my mom and that my family did not understand me. I struggled to fit even in my own family. I felt rejected and isolated myself."

This vacuum creates a need for a mother or father figure within the idea of a family and belonging somewhere. Richard's shared his experience during the focus group:

> "But let me say what hasn't been great… each person psychologically has a need for a father and a mother. And when your parents are taken away from you, nobody can fill that gap but it's a hole in the soul. It's a deep psychological pain. We can't fill that role. We don't have the capacity and so I feel that I have great pain and sorrow that I failed to be the father that they really need. And I know that. And they know that I know that, and we don't talk about it but it's true. And we have to talk about it because we will have to scale this and help a lot more children and every single family needs that father/mother role. As a psychologist and social worker, there is room for a lot more error and you don't have to have that same level of pain. In fact, if they have that level of pain, a social worker will burn out. But we do need to find ways because you can only be a father to so many children, so you got to work this out and we have to have more of these discussions".

The above shows how identities can be formed within development that challenge current development models and practices and how we think about what is necessary within development. It also suggests that a relational economy is about relational experiences and practices. These experiences and practices develop within long-term commitments that deepen the sense of belonging and family with the potential to create deeper, more sustainable and interdependent relationships. This is different from so-called development experts who provide professional care that is clinical and does not produce the depth and interdependence that may be required for more holistic development to occur. In the last quote above, Richard uses the word "pain" four times and the next section will focus on pain and the interdependence created within the relationships.

6.4.3 "But in every relationship is pain and you've got to go through the pain"

Development practices tend to focus on professionals who are expected to intervene as the "experts" in development by avoiding pain and focusing on diagnosing and "fixing" the problem. However, the previous section shows that development is "messy" when the relationships and the identity formations of participants are considered. Section 6.2.1 explained how Richard's acceptance of money for Lesedi from his friend caused him humiliation and embarrassment, which is important to understand within the "giver" and "receiver" relationship. The sense of humiliation is extended to the willingness of an organisation to accept and confront "pain" in the relationships. The Trust uses the word pain as part of its development philosophy and practice:

> "At a transformational level I care about you no matter what you choose to do... But how you actually live that out organisationally is a whole learning that we don't know yet ... We got it right to build family. Another thing is to stand in solidarity, that's what we're learning. It means that you are actually hurting. You go through the pain that they cause. And each person in this room has caused me enormous pain and I've caused them pain. And we've caused pain because of choices made and trust... But the commitment is long-term, it's for life" (Richard 16/03/2019).

The pain is something that "you've got to go through it because it has to be budgeted" and it is made within a long-term commitment, "not to fix" but to be there and "allow for the choices

to be made" (Richard). The pain relates to continuity and consistency over a long period. The Trust's approach is different from NGOs or community-based organisations who are dependent on funding for projects and programmes, which are often short-term, and it goes through strenuous reporting that must be quantifiable. Some critics of development aid and NGOs have raised concerns of the possibility of donor-dominance limiting the autonomy of NGOs who often divert from their core business to comply with donor driven-agendas (Banks, Hulme & Edwards 2015; Powell and Seddon 1997). The conditions, reporting and fluctuations in funding due to constantly fluctuating priorities of donors make sustainability and long-term planning difficult for organisations who are dependent on funding for plans and projects to continue (Parks 2008).

However, value and trust between people are created over time (Chambers 2005a). When an organisation's provision of care is dependent on and limited to funding, it also makes it difficult to commit not only in terms of resources, but it limits the potential to build a sense of momentum, growth, understanding, parity, stability and ultimately a sense of belonging and loyalty between the givers and receivers of care.

The Trust has not always had the resources and capacity to undertake holistic care, but the consistency and continuity within the relationship with household members have created not only a sense of family and belonging for some of the household members, but also a sense of interdependence. A "family model" requires high levels of interdependency and raises concerns on creating dependency between the receiver and the giver, but the data challenges this notion. Long-term continuity in a giver-receiver relationship can also change the relationship from dependency to interdependence. Khabane, Tsebo and Lerato commented in the focus group that they do not want to disappoint the Trust, but the "not wanting to disappoint" can be placed within a sense of belonging,

> "If you have a sense of belonging you do not want to do something wrong because you do not want to disappoint somebody who makes you feel the sense of belonging… So, in this Trust I feel there is a drive whereby you feel this sense of belonging, appreciated and valued" (Tsebo).

> "There is room for disappointment, and you need to wake yourself up and make things right. Even today I can still make others believe that there is hope. We must never judge" (Lerato).

Within the relationship "there is room for disappointment", but participants do not want to disappoint, not because of a fear that it will stop support from the Trust, but because they belong. The "sense of belonging" in the relationship shifts from not "doing something wrong" because it is based on a contract and a way to get resources to not "doing something wrong" because a person has a sense of his or her identity and belonging within a bigger whole. The latter is much more sustainable because the motivation changes and a person takes ownership and responsibility for their choices and actions because it is not about what they will gain but because they belong.

What has resulted within these relationship formations is that participants are interconnected, but the levels of interdependence also relate to the individual's own sense of agency and independence. From the data, household members say that they appreciate and acknowledge the support from the Trust but those who feel that they have been successful are also proud of their own hard work and discipline in achieving success. Lesedi (16/03/2019) measures success by being strong and independent, specifically as a woman; to be educated so that she does not rely on a man to take care of her (as quoted in section 6.2a). Sechaba (16/03/2019), as the older brother and head of household, desires more independence, but he takes responsibility and said he will always give 25% of his income to his household even when he has his own family.

The aspiration to be more independent is never fully separated from the responsibility to take care of others. Included in success is to "return to the little ones so they can also be successful" (Khabane 16/03/2019). During the focus group, a prominent theme throughout the day was reciprocity. The phrase "giving back" was mentioned eleven times by different participants. Participants such as Sechaba, Tsebo, Dineo, Lesedi and Khabane spoke about wanting to "give back", therefore, reciprocate as a response to what they felt the Trust gave to them. Lesedi and Khabane expressed it in the following way:

> "So, I have to give back, so I can be an example to others that 'she made it so why couldn't I'. So, I need to give back not because I'm forced to but because I want to, and it feels like it's something that I have to do" (Lesedi 16/03/2019).

> "And what they are providing to us, they don't expect us to give them back. But because of the love, the way we grow up, we have to give them back. But not only to James Trust but to others. They did not just draw a circle and put us in the circle to leave us there. No, they just give us knowledge, they just give us love and care. It is our responsibility, or I will just say it is our choice to give back to the community" (Khabane 16/03/2019).

The dynamics of the relationships also change the understanding of dependence and independence in the relationship due to the long-term relationships and sense of family and belonging. An organisation that functions more organically and approaches care as a "family" also has different levels of interdependence. When it functions like a "family", it means that there is more scope to deal with the "messiness" of challenges such as dependency in a familial way. As a result, the way in which care takes place and the language that is used shift from the interventions that makes care successful to the extent to which the relationship that has emerged can cope with the stress and strain of holistic development.

6.5 Conclusion

This chapter established that the identity formations that emerge from relationships between the givers and receivers of care and the perceived success of development are dependent on the deeper meanings that participants attach to relationships. These identity formations and socio-economic realities are constructed on invisible and intangible relationships, which dominant development theories do not recognise or acknowledge as essential to development. This "blind spot" in dominant development theories reveal the strength of its ideological commitment and it is at the cost of understanding the deeper underlying challenges, needs and dynamics of the so-called "givers" and "receivers" of care interventions. The questions that are asked by mainstream theorists are embedded so deeply within linear and economic perspectives of development that they does not even recognise that the questions that are asked are so limited that they perpetuate the development problems and deepen issues such as poverty and inequality.

The chapter provided the context of and background to the relationships between the Trust and households with results from the Relational Proximity Framework. The findings suggest that a

relational approach should be reciprocal to the extent that the giver of resources can identify with the receiver of resources. In this sense, healthy relationships are not defined only as the success of interventions within holistic development, but whether the understanding of connectedness, shared story, roots, trust, appreciation, respect and purpose in the relationships are deep enough to hold within it the pressures and challenges that come with holistic care and development.

The RPF results were shared within a focus group of participants from the Trust secretariat and young adults who have been part of the care of the Trust for ten to sixteen years. The chapter explored how holistic care has been sustained over many years as a result of how the relationships are viewed by participants. The themes that emerged include that development is not just about money or resources but also about family, belonging, truth-telling, learning and honesty, which can be placed within the significance of continuity of relationships over a long time. These themes and the language that participants used can inform what is required within a relational economy to ensure that the relationships can bear up under the weight of the challenges of holistic care and development.

The findings, as they were analysed through a relational approach, challenge the current care practice and development discourse more broadly. One of the problems is that care practitioners are often viewed as the professional experts who know what is needed in development by focusing on diagnosing and "fixing" the problem. Another problem is NGOs' or community-based organisations' reliance on funding for projects, programmes and strenuous reporting, which limits the sustainability of care interventions and building relationships. The data challenges the ethnocentric nature of development and social work within African contexts to attain better understandings of the realities and experiences of the relationships between different people and groups within development and care. Development practices require much deeper understandings of the different relational experiences in development and care relationships to move beyond development models that are clinical and limiting the potential for deeper, more sustainable, and interdependent relationships. The data also highlights the significance of development practice built over a long period in terms of establishing a sense of momentum, growth, understanding, parity, stability and ultimately a sense of belonging and loyalty between the givers and receivers of care. This is why short-term interventions from NGOs and care organisations are not effective.

The above highlights the unique, nonlinear and unbounded factors that shape development as a cyclical and circular process, which challenges linear and “one-size-fits-all” approaches to development. The research further established that development is largely about identity formations that emerge from social networks and relationships. The relationships can be sustained if they are embraced within the “messiness” of development and as part of understanding pain, disappointment and the interdependencies of these development relationships. The chapter found that the health of relationships is not simply dependent on the success of interventions, but rather on whether there is a deeper understanding of belonging, respect, trust and other relational aspects when dealing with different responses within a crisis. Human development indicators (such as education) form part of the dynamics within a care relationship. The perceptions from the various parties in a relationship provide much greater insight into the relationship to further investigate how the relationships have developed over time and how the relationships have contributed to development “success” or “failures”.

CHAPTER SEVEN: CONCLUSION AND AREAS FOR FURTHER RESEARCH

7.1 Introduction

This research explored how a relational approach can inform and guide our understanding of development. The study interrogated the question from a Relational Thinking framework to provide both the conceptual foundations and practical methods to study highly complex human relationships. This study comes at a time when a growing body of literature is questioning the ideological traps that have locked development policy in redundant arguments and searching for alternative ways of understanding and addressing issues within development. In search of alternatives to current development practice, the research examined the relational dynamics between an NGO (James 1:27 Trust) and the households under their care. This study has contributed to knowledge by exploring the gaps in development theory and practice through a relational framework to rethink human development along relational lines. The utilisation of Relational Thinking and the Relational Proximity Framework as methodology has revealed methods and indicators that are not often considered in development studies.

This chapter will conclude the study by firstly providing an overview of the main arguments from the preceding chapters. Secondly, it will state the five secondary research questions and discuss how these questions have helped to reach the final conclusions of this study. Thirdly, it will explain the theoretical and methodological contributions of this study to the body of knowledge. Fourthly, it will provide further implications and recommendations for future research, and lastly a conclusion.

7.2 Overview of preceding chapters

The study has been organised in seven chapters. Chapter one introduced the study and provided essential context for the research. The chapter explained the major challenges in development theory and practice to consider emerging development alternative theories and briefly introduced the James 1:27 Trust as the case study of the research. The chapter outlined the aim and objectives of the study, defined key concepts as they were used in the thesis and explained Relational Thinking and relational and human economy approaches as the conceptual foundation and framework for this study.

The second chapter provided a detailed overview of the development discourse and highlighted the fault lines of the rather wide-ranging schools of thought on development, from the structuralists to the dependency theorists, to modernisation theorists and later neoliberalism. The chapter pointed to the persistence of a development impasse since challenges to the mainstream development theories and practice have not translated into a viable alternative development model or infiltrated the development debate sufficiently. Mainstream development theories dominate, co-opt, and repackage countering development theories into the same one-dimensional, linear and reductionist economic lenses of development. As a result, development challenges such as poverty and inequality have also not been addressed sufficiently. The absence of relational perspectives and thinking in the development discourse and debates was highlighted throughout the chapter, and was then explored further in chapter three.

Chapter three explored the relational element of development, specifically in relation to the context of South Africa, in order to set the scene for the case study research. The chapter started with a discussion on the frameworks, policies and research related to development in South Africa as part of the global development enterprise, especially in addressing issues such as poverty and inequality in the country. The idea of creating a care economy was explained as it relates to South Africa and the case study of the research. Development theories are increasingly grappling with the multifaceted challenges of poverty and inequality, but development philosophies, development language and meanings, measures and interventions often misdiagnose the problems.

A key argument in the chapter was that the human development paradigm (as it developed from Amartya Sen's capabilities approach) focuses on multifaceted aspects of development but is individualistic in approach. This chapter positioned the research within a relational approach to development where a person's well-being depends not only on their individual capabilities or functionings, but is dependent on the health of relationships between individuals and groups within society. As such, Relational Thinking and the Relational Proximity Framework (as it developed at the Jubilee Centre and Relationships Foundation in Cambridge) were detailed as a conceptual framework and instrument with terms and indicators that are elaborate yet measurable. The key drivers of the Relational Proximity Framework were introduced in this chapter and include directness, continuity, multiplexity, parity and commonality. The human

economy approach is an additional lens since it focuses on the study of economic alternatives through an interdisciplinary approach and as part of a Southern paradigm for development.

Chapter four discussed the research methodology that guided the data collection on the James 1:27 Trust. This research is situated in an interpretivist approach and a case study method was adopted to gain deeper knowledge about the experiences, meanings and interpretations of the organisation under study. The Trust claims to have alternative ideas to structuring society in more relational and caring ways. The organisation was chosen as a critical case through purposive sampling, which is particularly useful in exploratory qualitative research where a small or single case can be used to explain the phenomenon of interest. A mixed-method approach was used within a relational framework and with relational indicators to draw on the meanings and experiences of the research participants and to examine how participants view and interpret development. The quantitative and qualitative research methods provided more complete and varied evidence which allowed for greater depth, breadth and corroborating the findings.

This chapter discussed the research techniques used to collect the data, namely a participant observation, document analysis, the Relational Proximity Framework questionnaire, semi-structured interviews and a focus group between Trust staff and Trust household members (who have been under the care of the organisation for ten to sixteen years). The qualitative research included 12 participants who either completed the Relational Proximity Framework (RPF) questionnaires or participated in the focus group, or both. The research also used the Multidimensional Poverty Index (MPI) which is an important index in human development that measures standards of living, education and health of people. The MPI compared the human development of Trust households with other households in a similar area but who do not receive support from any organisations. The findings from the MPI revealed limits to using human development indicators since it is blind to relational issues and questions that have not been explored by the current development enterprise. The use of multiple research techniques corroborated the findings of this study (discussed in chapters five and six) in the exploration of Relational Thinking as a research method in development studies and practice.

Chapter five analysed the Trust through a document analysis to gain insights into the deeper and underlying thinking, philosophy and practices of the Trust. The preliminary analysis informed the interview process and further analysis of the Trust, and provided an important

base from which to do further quantitative and qualitative research based on a relational approach. In this chapter, the researcher used the establishment, development and continuum of the Trust to critically analyse some of the development concepts used by the organisation.

The chapter critiqued some of the terms and concepts that the Trust uses without questioning the underlying assumptions, values and standards attached to these terms. Terms used in development such as "empowering", "orphans, vulnerable children and youth" and "beneficiaries" could have negative and disempowering effects, while business and capitalist terms such "clients", "monetise, productise, commercialise" "value offering", "social consumer" and "social market" define relationships primarily in economic terms and create distance in a relationship when the intention is to build relationally. It is not only the words and language used but also standards of care (such as the UNCRC index) largely adopted from "Western" norms and standards that have a tendency to be individualistic and lack a relational approach to development. There is a gap between how these words are used and what they imply, and what is then done in practice.

The Trust claims to develop a care model with systems and processes to create a supportive and caring society. However, they have co-opted mainstream development terms that may undermine their relational approach. The adoption of certain words and standards shows the continued strength of mainstream development thinking despite considerable criticism against its assumptions, "one-size-fits-all" and top-down approaches within the development discourse. When the Trust's language and concepts are considered alongside human development indicators (as measured by the Multidimensional Poverty Index), it appears that the Trust has not made a significant impact on caring holistically for a small group of households. However, further in-depth research through a relational lens provided a more nuanced picture of the Trust's care and a deeper understanding of the relational dynamics between participants that shape development and how it can inform a relational economy. This was explored in chapter six.

Chapter six was based on the primary research of this study (including relational questionnaires and further qualitative research) to examine some of the Trust relationships. To gain such an understanding, the domains of the Relational Proximity Framework, namely, communication, time, information, power and purpose of relationships, was particularly helpful. The RPF

results were shared within a focus group of participants from the Trust secretariat and young adults who have been part of the care of the Trust for ten to sixteen years.

This chapter presented the findings from the primary data to explore how the varying views can inform a relational economy. Participants described their relationships as a journey where "money" and "goodies" are not always important. Instead, relational aspects emerged from the discussion, including words such as "commitment", "never giving up" or "rejecting", "guiding", "caring" and "being somebody". The themes that emerged include that development is about family, belonging, truth-telling, learning and honesty, as they have developed over a long period.

The chapter found that the health of relationships is not simply dependent on the success of interventions, but rather on whether there is a deeper understanding of belonging, respect, trust and other relational aspects when dealing with different responses within a crisis. Human development indicators (such as education) form part of the dynamics within a care relationship. Development is shaped by cyclical and circular processes that are unique, nonlinear and unbounded. The research further established that development is about identity formations that emerge from social networks and relationships that can be sustained if they are embraced within the "messiness" of development and as part of understanding pain, disappointment and the interdependencies of development relationships.

The themes that emerged, therefore, challenge current development models and the clinical role of so-called experts in development practice. Development is not only about the interventions that are needed but rather whether relationships within development (and the meaning attached to those relationships) are strong enough to endure under the stress of holistic care.

7.3 Main conclusions

The research was driven by five secondary research questions as identified in section 1.3 of chapter one. The sub-sections below will examine how these questions have helped to reach the final conclusions of this study.

7.3.1 What are the relational dynamics between the James 1:27 Trust and household members?

In answering the first secondary research question, the research employed the Relational Proximity Framework (RPF) as an instrument to measure the interpersonal relationships between participants in the research and to show how key respondents relate to each other – the perceptions on proximation or distance of specific relationships. Throughout the thesis, the argument was that research in development should recognise the importance of relationships between people, groups and societies through new perspectives, interpretive categories and predictive models (Mills & Schluter 2012). The study suggested that the Relational Proximity Framework provides such a measurement with indicators that include different domains and drivers of relationships, namely communication (directness), time (continuity), information (multiplexity), power (parity) and purpose (commonality). Throughout this research, "healthy relationships" were defined according to the Relational Proximity Framework as the presence of a sense of connection between individuals and groups, a shared story, roots and reliability within the relationship, mutual appreciation, understanding and predictability, mutual respect and fairness in the relationship and a shared identity, unity and purpose in the relationship (Relational Analytics 2017).

The ability to measure relationships between people, or within or between organisations generate insightful and robust empirical data about a seemingly intangible aspect of organisations and allows for a more dispassionate exploration of how an organisation is functioning relationally (Relationships Foundation 2019). The data collected in the relational framework provided a rich and useful framing and lens for further coding and analysis as it relates to the main objectives of the research. The scores from the RPF results indicated the differences in how the Trust care team and households scored the relationships. The differences were bigger for directness (20%), continuity (20%) and multiplexity (21%), while the difference for parity dropped to 15% and was lowest for commonality at 8%. These scores provided indicators and a level of understanding of the dynamics in the relationships, which were then analysed further during the qualitative part of the research, including the interviews and focus group.

7.3.2 How do Relational Thinking and the Relational Proximity Framework provide a deeper understanding of the relational dynamics between different people and groups?

The second secondary research question followed on the first. The RPF results and relational drivers provided a framework with language and an analysis tool to draw out and interpret themes as they emerged from the qualitative data. It led to deeper insights into how participants perceive not only the relational dynamics but also as they relate to development. For example, in the RPF results, there was only an 8% difference between how the Trust care team and the household members view commonality in the relationship. The idea of family has therefore created a strong sense of commonality in the relationship between the Trust and household members. This means that intentions, purpose, values and goals are shared in ways that bring synergy and motivation to the relationship. The value placed on family also extended to how participants experienced belonging in the relationship, which is reflected in how participants scored parity (15% difference) between the Trust and household members in the RPF results. Belonging, however, does not mean that there is complete harmony but is rather linked to how continuity in the relationships has created a deeper sense of belonging to deal with issues and challenges in ways that are difficult but honest. The RPF results showed that continuity was scored high by both household members and the Trust team. High continuity in the relationships relates to stability in the relationship, which means there is also room to make mistakes, for learning together, truth-telling and honesty in the relationship.

The sense of being part of a family and belonging within development practice can therefore have important implications for how so-called “givers” and “receivers” relate. This supports the literature on the importance of the sociality of a person and the argument that more value should be placed on persons as inherently embedded in and constituted of social relationships. Belonging to a diverse “intergenerational family” is an important component of human identity, self-determining freedom and as a precondition of healthy moral and social development (Cahill 2006).

The above results revealed different findings from the Multidimensional Poverty Index (MPI), which was initially used to compare the human development (standards of living, health and education) of households under the care of the Trust with households in the same area without interventions from an organisation. The MPI results showed only small differences between

the Trust households and the other households, but the RPF results provided a much more nuanced perspective on the Trust's care. This is critical to development but neglected by human development measures, which are largely individualistic and focused on material resources within development (Deneulin et al. 2006).

7.3.3 To what extent do the perceptions on the quality of relationships between people influence and impact development?

The third secondary research question builds on the first and second questions by deepening the link between the RPF results (and how participants viewed the relationships) and its significance in development. The data revealed that there is a strong link between how participants perceived the relationship and how these perceptions have shaped not only the relationships but also human development. The analysis included examples from the data on a crisis, as well as the responses and relational outcomes between the Trust and household members. It showed that the "success" in development is not determined solely by human development results, but whether relationships are strong enough and able to endure under the pressure of a crisis and the different choices made within the crisis. The perceptions of the relationships are intrinsic to whether the relationship can be sustained in a crisis. When there is a deeper sense of connection, a shared story, roots, trust, mutual appreciation and respect, understanding and shared purpose in the relationship between the Trust and a household member, the development relationship is likely to endure. The health of a relationship, therefore, is not simply about the success or failure of interventions, but whether there is a deeper understanding of, and a high value placed on, the relationship.

In the South African context, the value placed on relationships was particularly insightful as part of the identity formations that have occurred in the relationships between participants. As a result of the major HIV/AIDS pandemic in South African in the early 2000s, many children lost their parents, which has created a vacuum for many household members who participated in the study. The data revealed that the long-term commitment and continuity between the Trust and household members have shaped the relationships into more familial bonds. These bonds have created greater levels of interdependency between participants and, as a result, participants feel that they belong and want to "give back" to others. The participants described what they value in the relationship and this informed what a relational economy could look like, as explored further through research question four.

7.3.4 What are some of the fundamental indicators often ignored by development theory and practice?

The fourth secondary question built further on question three by focusing on the meanings attached to the relationships between participants and how their perceptions influenced the understanding of development. The application of the RPF to a particular case was to help make logical generalisations about the themes that emerged from the data. These themes can inform a relational economy as part of understanding development and include the following:

A relational economy is not only about resources, tangible needs, and individual capabilities, but is centrally about relational capabilities. The relational terms and language from the data emphasise aspects within development that are not often considered in current development models. A relational economy is about the idea of creating "family" where people have "journeyed together" and "there is a history". Within the relationships are about "commitment", not giving up, not rejecting, guiding, being involved, and being taken seriously.

Furthermore, a relational economy is about belonging and a sense of respect, bonding, security, value, appreciation and where people "pay attention" and "show up" in the relationship. With a sense of belonging, commitment and continuity in the relationships, there is also scope for truth-telling and being honest about differences and challenges in the relationships, which creates greater parity in the relationship. A relational economy may be "messy", since identity formations and familial bonds do not fit well into current development discourses and practice. A relational economy will not be afraid of dealing with pain, "you've got to go through it because it has to be budgeted" and it is made within a long-term commitment which is important in creating deeper levels of interdependence between different people and groups.

The Trust has not always had the resources and capacity to do holistic care, but the consistency and continuity in the relationship with household members have created not only a sense of family and belonging but also a sense of interdependence. An organisation that functions more organically and approaches care as a "family" also has different levels of interdependence. When it functions like a "family", it means that there is more scope to deal with the "messiness" of challenges such as dependency in a familial way. Dependency on resources remains an issue in the relationship, but the continuity in the relationship and participants' sense of belonging

have led to aspirations to be more independent financially from the organisation while the emphasis has shifted to "giving back" to others.

7.3.5 How do relational dimensions and indicators relate to development theory and practice?

The final secondary research questions aimed to show how these relational measures and aspects inform understandings of development theory and practice. The research showed that the application of relational measures and drivers provide more nuanced understandings of how the relationships between the "givers" and "receivers" of care in development are viewed through the RPF, which gives the results of both parties in relation to the other. The perceptions from the various parties in a relationship provide much greater insight into the relationship to further investigate how the relationships have developed over time and how the relationships have contributed to development "success" or "failures".

As a result, the data shows that responses and outcomes change as the relational interactions unfold through the choices that the different parties make. This occurs within different, unique and cyclical processes of development instead of a linear movement from point A to point B (Rostow 1991). This study finds limited legitimacy for linear or dualistic tools to analyse development, but rather found evidence that relationships between the Trust and households are influenced by nonlinear and unbounded factors.

The data further challenged the ethnocentric nature of development and social work in African contexts to attain better understandings of the realities and experiences of the relationships between different people and groups within development and care (Casimir & Samuel 2015; Smith 2014). Development practice tends to focus on professionals who are expected to diagnose and intervene as the experts in development by avoiding pain and focusing on diagnosing and "fixing" the problem. However, the research showed that development is "messy" when the relationships and the identity formations of participants are considered. It therefore requires much deeper understandings of the different relational experiences and practices in development and care relationships to move beyond development models that are clinical and limits the potential for deeper, more sustainable, and interdependent relationships.

The data also highlights the significance of development practice built over a long period in terms of establishing a sense of momentum, growth, understanding, parity, stability and ultimately a sense of belonging and loyalty between the givers and receivers of care. This highlights the limitations of many NGOs or community-based organisations who are dependent on funding for projects and programmes, which are often short-term, and require strenuous reporting that must be quantifiable (Parks 2008). Value and trust between people are created over time (Chambers 2005a) and the data has shown that this has taken many years and within a family model. When an organisation's provision of care is dependent on and limited to funding, it also makes it difficult to commit and build a sense of trust and momentum over the long term to achieve levels of sustainability in the care and development model.

7.4 Reflections on the primary research question: theoretical and methodological contributions

The above secondary questions have helped to answer the primary question and research puzzle that this study aimed to solve: how can a relational approach inform and guide the understanding of development? In this study, the theoretical and methodological contributions of the research interact with each other. Development philosophies shape development measurements, which shape development interventions. This research used a consistent thread that ties together the relational dynamics of development through a relational development philosophy with relational measurements, instruments and indicators that seek a deeper understanding of questions that we are not asking within development.

This research challenges the conceptual deficiencies and *unrelational* dynamics of dominant development theories. Alternative development models have brought reforms to development but have not transformed how we think about development. They seem trapped and are often co-opted by mainstream development theories, which makes it increasingly difficult to distinguish between mainstream and alternative paradigms of development (Nederveen Pieterse 2001). This research contends that the convergence of development philosophies around human development measurements and indicators, as informed by Amartya Sen's (2005) capability approach, is limited because it is largely situated within an individualistic philosophy. The thesis touches on other philosophies, particularly within African thinking and values, which include a much deeper understanding of social relationships on which societies and economies are structured (Munyaka & Mothlabi 2009; Ramose 2003).

A further argument is that development philosophies have underlying values and goals that affect the measures used and interventions taken within development. When we suggest relational philosophies about development, it also requires asking questions that have not been considered in development but are important to development (Mills & Schluter 2012). The research focus was, therefore, on measuring the perceived quality of relations between people within a relational philosophy, arguing that the well-being of society should not be studied only in terms of individual or collective well-being but through a relational approach (Ashcroft & Schluter 2005). This study builds on Relational Thinking (Relational Analytics 2017) and defines healthy relationships from the RPF as the sense of connection between individuals and groups, a shared story, roots and reliability within the relationship, mutual appreciation, understanding and predictability, mutual respect and fairness in the relationship, and a shared identity, unity and purpose in the relationship.

The thesis makes a theoretical contribution to knowledge by suggesting a much deeper consideration and understanding of relationships between people within development. The thesis contributes methodologically to multidimensional measures to development as it has developed globally (Alrike & Santos 2010; Boulanger 2008; Crous and Attlee 2014; New Economics 2017; Wilkinson & Pickett 2009; Stiglitz, Sen & Fitoussi 2009; UNDP 2019) and in South Africa (Esau and Leibbrandt 2017; Finn et al. 2010; MISTRA 2016; Neff 2007; Noble 2014; Noble and Wright 2013; PSPPD 2016; Wilson & Cornell 2012) by exploring relational instruments and measures. The study has shown that there are factors that are not always considered among typical human development indicators, which Chambers (1995) and Schluter (2006) have also pointed to through more critical scrutiny of development measurements.

The thematic analysis of the primary data, through the lens of relational economy, challenges current care practices and the understandings of how the givers and receivers of care relate. The underlying perceptions of the relationships are important in the choices made in care interventions and are informed by how the relationships are viewed by those in the care intervention. Resources to address human development needs (such as education and health) are important, but the data shows that participants view human development relationally as part of growing, learning and developing through finding identity, life and purpose. Participants specifically mentioned that development and holistic care is not just about the money and

resources and mentioned relational and intangible aspects such as “commitment”, “they have never given up on us”, “they never rejected us and have trust in us”; “they are always there”… “guiding”… “involved”…“I’m being loved, taken seriously, I’m somebody”. Notable value is placed on social relationships (Cahill 2006; Deneulin 2006; Ricioeur 2006).

Holistic care includes understandings such as that care interventions are about family, belonging, truth-telling, learning together and honesty (as highlighted in the previous section). The above explanations and experiences assign different values to the meaning of development, which is embedded within relational values such as family and belonging. These values emerged within a development context where people are “acting and speaking together” to achieve certain outcomes which may be unpredictable because the choice and actions within social networks are unpredictable (Phelps 2006). But within these networks, there are identity formations (Golden et al. 2002) that have occurred within and between participants. Development practice, therefore, extend beyond professionals who are expected to diagnose and intervene as the experts in development by avoiding pain and focusing on diagnosing and “fixing” the problem. However, the data challenges this by showing the significance of “going through the pain” and “not to fix” but allowing choices to be made by all parties in the relationship.

The research also challenges care interventions that are dependent on funding and reporting (Banks, Hulme & Edwards 2015; Parks 2008) to the extent that they can never fully commit to long-term care, which is important to build momentum, trust and resilience in care relationships and interventions. The data reveals that continuity built over a long period, where there is security, commitment and familial bonds, has a notable impact on participants. The identity formations and interdependence between the givers and receivers of care seem “messy”, but significant. Continuity, value and trust between people are created over time (Chambers 2005a). As a result, in these relationship formations, participants are interconnected, but the levels of interdependence also relate to the individual’s own sense of agency and independence.

From the data, it is evident that household members appreciate and acknowledge the support from the Trust, but those who feel that they have been successful are also proud of their own hard work and discipline in achieving success. The aspiration to be more independent is never fully separated from the responsibility to take care of others. It emphasises the circular nature of development and challenges short-term interventions focusing on human development

without considering that the relational consistency and efforts to develop greater levels of parity over time in the relationships have been significant in creating a more sustainable model of care. In this model, the long-term commitment and support have sustained the development even at times when there were little funding and resources available.

The research findings also point to the importance of understandings and meanings attached to the relationships in particular contexts. In the South African context, with more integrated and interdependent understandings of extended families and communities (Nabudere 2011; Njoh 2006), participants viewed themselves as part of a wider social network where familial relationships have developed and there is a desire to deepen these relationships. The sense of family, belonging, truth-telling, learning, honesty and continuity in the relationships between participants seemed significant in the identity formations that have taken place between the givers and receivers in development. The above shows how identities can be formed within development, which challenges current development models and practices and how we think about what is necessary within development. It also suggests that a relational economy is about relational experiences, practices and long-term commitments between the givers and receivers of care which allows for deeper, more sustainable and interdependent relationships to develop.

The data challenges the dominant and ethnocentric nature of development and social work within African contexts (Casimir & Samuel 2015; Ibrahima and Mattaina 2019; Smith 2014). The themes that emerged are tied to relational capabilities and the concept that the development of each person is embedded in and constituted of social relationships (Cahill 2006). The language that participants used such as belonging, appreciation, value, bonding and paying attention to each other reflect much deeper understandings within African philosophies of social relationships on which societies and economies are structured (Munyaka & Mothlabi 2009; Ramose 2003). These are relational terms that inform how people can speak about and understand development within a relational economy, even as these terms are not currently considered as central to development theories and practice.

The findings raise further questions within the broader development discourse. The global development enterprise seems to have failed. The neoliberal and mainstream dominance is increasingly questioned for failing to deliver on its development promise. Neo-Marxist theories have shown strong resistance to mainstream dominance but are also trapped in a development

impasse. A development impasse persists between mainstream and counter-perspectives to development and between state-market-civil society debates on development.

This research contributes to the growing body of literature on alternative theories of development by suggesting a global south paradigm of development in which a relational economy framework is a critical dynamic in developing countries. The shift is to understand the conceptual importance of relationships between people as central to development by moving away from market and state debates on development to understanding and measuring the relationships between people in the development sector. It seems that there are gaps in knowledge and assumptions in care relationships within development that are not understood or addressed by care interventions because those questions were never asked or explored by current human development measures.

The thesis started by highlighting the glaring gaps of the ideological commitments of mainstream development theories (particularly neoliberalism) and its negative practical implications. The results of this study have shown the strength of mainstream development ideas as they persist in the language and terminology used in development practice. Further investigation reveals what has been ignored in dominant development models due to strong ideological commitments to economic and material security, but it is at the cost of understanding the deeper underlying challenges, needs and dynamics of relationships between people within development. These ideological commitments work against the well-being of many people and groups within societies and ignore how identity formations and socio-economic realities are constructed on invisible and intangible relationships.

Development is not a forward-moving trajectory from point A to point B, as was first promoted by prominent mainstream economist Walt Rostow (1991). Development is cyclical, circular and unique because it emerges from relationships between people. The data revealed that these identity formations are complex and "entangled" as the relationships are "twisted together or entwined, involved with; it speaks of an intimacy gained, even if it was resisted, or ignored or uninvited". It further "works with difference and sameness but also with their limits, their predicaments, their moments of complication" (Nuttal 2009: 1).

A linear approach to development and using objective linear measurements such as income or standards of living is an inadequate diagnostic of development. The argument is that getting

out of the poverty trap is expensive and requires vast amounts of resources, capacities and improved programme designs, but efforts continue to fail (Munk 2014). It is more important to be part of how development occurs and to understand it more deeply before suggesting what should be done. This contributes to developing multidisciplinary and holistic approaches to development. The indicators used in this study to measure relational dynamics ask questions that are not necessarily the focus of other development measuring instruments. It raises questions on the relational capabilities of people to function. What are the relationships that influence the actions, choices and outcomes of an individual or group?

The Relational Framework was used to examine some of the underlying practices, processes and behaviours of relationships and as a way to better understand the extent to which relational value is built between different individuals and groups and how it can inform a relational economy. The idea is to go beyond compartmentalising issues into social, economic, political, personal, and other issues and often focusing on monetary problems and responses. A relational framework is in a much better position to do so.

7.5 Further implications and recommendations for future research

A relational economy can be situated within alternative economic theories as a way to rethink human development along relational lines. Current mainstream development theories and practices have been critiqued over the years, but those challenging mainstream development, either become co-opted in the subtleties of the dominant ideas of development or have not been able to infiltrate the development debate sufficiently.

The existing development measures that are used globally stem from development philosophies that focus on material aspects of care and development, but these leave gaps in knowledge. The goal in development interventions is often to address material needs, but there is a blind spot to the relational issues. If a different set of questions about the relational dynamic of development interventions were to be asked, different kinds of interventions would start to be imagined. But as long as those questions are not being asked, interventions will continue in their same rut.

In this thesis, asking questions about the relational dynamics within an NGO with a holistic and “family-based model” have revealed the importance of developing care models that focus

on creating family, belonging and continuity within relationships. As such, central to a relational economy is a much deeper understanding of the network of relationships that produces either positive or negative relational and development outcomes.

The development enterprise has failed to deliver on its promise to the poor around the world, in so far as it is implemented from neoliberal doctrine. Development interventions have failed, and development measurements have contributed to their failure. The Covid-19[7] pandemic has exposed our economic system. Perhaps this is an opportunity for the emergence of a new economy, one based on relationships and relationality.

The study attempted to show the value of a relational framework with relational instruments to deepen the understanding of development theory and practice. The relational questions within a relational framework produce data on something as complex as relationships in ways that help to simplify and explain, and to allow for further dialogue and understanding between different people. It also gives different perceptions of the relationship, which provides a much fuller picture of the relational dynamics and takes away some of the risks of a top-down approach. The confidentiality of participants in the study was important, since participants may be guarded in their response depending on how they think the other person may react or respond. The relational framework provided datasets and language that participants were able to relate to. The relationships can also be measured over time to gain deeper insights into what has been viewed as successful and what is required to sustain the relationships and help manage the complexity of relationships in terms of the contact, continuity, knowledge of others, power and parity risks, shared purpose and understanding differences.

The research established different understandings of development based on the primary data through a relational lens and, with the above in mind, allows for further research to be conducted within a relational approach. The study findings centred on a micro perspective of development, but the meanings that people give to development through a relational lens are also important in deepening macro perspectives on what is important in

[7] By the end of April 2020, over 3 million people globally were infected by the virus, 215,000 had died and there was no cure (by end of April). The World Food Programme had predicted that more than a quarter of a billion people will suffer acute hunger at the end of 2020, global capitals had shut down, airlines grounded, borders closed, and the global economy is in the deepest recession in a century.

development. Through further Relational Proximity assessments into the relationships within and between governments, citizens, and various sectors in society what could be discovered? Generating more relational data may also assist practitioners and policymakers in creating social and economic policy environments that influence a society's capacity to build healthy relationships.

Future research can consider the following questions:

- What are the implications for development in the James 1:27 Trust model when the stakeholder relationships are measured through a relational approach?
- What are the similarities and differences between the James 1:27 Trust model compared to other NGOs and community-based organisations when the relationships within the care interventions are considered?
- To what extent are the Trust's care model and interventions scalable?
- How do the Trust's Relational Proximity Framework results between the Trust and household members compare when it is conducted over time?
- What are the relational dynamics within the development sector of South Africa?
- What are the relational dynamics between different sectors of the South African society (such as government and citizens, government and NGOs, and government and business)?
- To what extent do the perceptions on the quality of relationships between different sectors in the South African society impact development?
- How can relational indicators be used to link the quality of relationships between people to specified outcomes of interventions?
- How can relational indicators and the quality of relationships between people be used with other indicators (such as perceptions of well-being) or more objective proxy measurements (such as crime levels) in the South African context?
- How can African philosophies and thinking contribute to deeper understandings of structuring societies and economies on social relationships?

Our current global economic order is operating in compartmentalised, segmented and unsustainable ways. The world-wide spread of Covid-19, which started in Wuhan, China, in December 2019, has wreaked havoc to the global economy, not seen in a century. In such

devastation, it has exposed the shallow foundations of the neoliberal empire. The Covid-19 pandemic poses serious challenges to the current way that our economies and societies are operating. The pandemic has made it startling clear and is giving us the opportunity to radically rethink human development. The reality is that how we operate and the systems we build are intrinsically integrated and requires deeper understandings along relational lines. The research established that the effectiveness of social and economic interventions should not so much be measured during ordinary times but during moments of crisis. Interventions which have been strong enough to endure crises have a stronger relational base than pure economic transaction. We, therefore, need a relational approach to analyse the different relationships between different people, their responses, understandings and the reciprocal impacts on others.

This research sought to find an alternative to the neo-liberal way of addressing inequality, and a commitment to people and livelihoods might just be a reasonable alternative to elite based economy. If we are to build a more equal society, we will have to build a relational economy, where the success in development is not determined solely by abstract statistics, but also by stronger relationships. The scientific journey to building a more equal society is a noble timeless cause to which this study lends its weight.

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PRIMARY SOURCES

Focus Group – Dineo, Khabane, Lebo, Lesedi, Mark, Richard, Samantha, Sechaba, Tsebo (16/03/2019)

James 1:27 Trust Video – Beneficiaries share their stories (13/03/2016)

Meeting: James 1:27 Trust and Household Members – Lebo, Mark, Richard, Samantha, Sechaba, Tsebo (15/03/2019)

Report – James 1:27 Trust Social Work Report on Household 4 (2012)

Personal Interview – Bheka (26/07/2018)

Personal Interview - Johan (06/11/2019)

Personal Interview - Khabane (19/03/2019)

Personal Interview - Lesedi (19/03/2019)

Personal Interview - Mishka (09/10/2018)

Personal Interview - Richard (29/03/2019)

Personal Interview - Sai (06/11//2019)

Personal Interview - Sechaba (19/03/2019)

Personal Interview - Susan (07/11/2019)

Personal Interview - Tsebo. (02/04/2019)

Source Document - James 1:27 Trust. 2018. PowerPoint presentation on the James 1:27 Trust.

Source Document – James 1:27 Trust. 2019. Compiled history and overview of the James 1:27 Trust.

Source Document - Botha, R.A (Founder). 2010 (MA thesis: The James 1:27 Trust Programme: a case study of an information, communication and technology (ICT) response to orphans and vulnerable children in the context of an HIV and AIDS epidemic. Pretoria: University of South Africa)

Source Document – James 1:27 Trust. 2015a. Strategic Perspective.

Source Document – James 1:27 Trust. 2015b. Davos-Klosters, World Economic Forum Meeting: Input by the James 1:27 Trust, a SAP civil society partner in pursuit of Davos' Social Covenant.

James 1:27 Trust website, https://www.james127trust.org/

APPENDIXES

Appendix 1: GATEKEEPER LETTER

The Innovation Hub, Innovation Centre, Office M69
Mark Shuttleworth Street Pretoria 0087, South Africa
P.O. Box 58
Tel: +27 (0) 12 844 0489
Email: info@james127trust.org

Date: May 2018

Student Name: Marlie Holtzhausen

Student Number: 29148512

Dear Ms Holtzhausen,

Re: Permission to conduct research at James 1:27 Trust

This letter serves to grant Ms Marlie Holtzhausen of the University of Pretoria, permission to conduct research for her research topic entitled "From Washington Consensus towards a relational economy: Relational and human economy approach to addressing poverty and inequality in South Africa", at the James 1:27 Trust. Please note that for the purposes of conducting the questionnaire and interviewing members of the Trust, you will approach them directly and participation is on a voluntary basis. The study should be conducted within the ambit of good research and ethics as laid down by the University and include confidentiality and anonymity where necessary.

We wish you well with your research endeavour.

Sincerely

_____

SIGNATURE

NAME:
POSITION:

Appendix 2: INFORMED CONSENT

UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Faculty of Humanities
Department of Political Sciences

CONSENT FORM

Data collection on relational approaches to understanding and addressing inequality and poverty in South Africa.

Dear Sir/Madam.

My name is Marlie Holtzhausen, a PhD student in the Department of Political Sciences at the University of Pretoria. As part of my PhD project, I am collecting information on the James 1:27 Trust to assess relational approaches to poverty and inequality. The relations being measured relate to the James 1:27 Trust Secretariat and their key stakeholders.

The collection of data will consist of two separate but related processes. The first part of the process will involve quantitative research by conducting a 20-minute questionnaire survey on the interpersonal relationships between the Trust and its stakeholders. The second part of the process will involve a qualitative approach to collecting data through a set face to face (semi-structured) interviews in line with the results of the relational assessment to explore weak and strong relational proximity and gain a deeper understanding of the participants responses. This interview will take approximately 45 minutes.

The information will be used for academic purposes, but the findings may also be used to write pieces for the media, speak on the radio, write academic articles and book chapters, etc. **Your input will be treated strictly confidentially.** Your responses to this questionnaire will be presented anonymously, but please note that in some cases it will be possible to make an approximate guess on what your response might have been. However, it is the analysis and interpretation of your answers together with those of your colleagues and members of the other organisations that will inform the study.

Participation in this interview is voluntary, and as such there are no financial or any other material benefits expected from this exercise. You are also free to withdraw from the interview at any time that you feel uncomfortable. I would like to request to record the interview for easy transcription and analysis of data. Collected data will be in my possession and will be kept safely for confidentiality purposes. After completion of the study, the material will be stored in University Pretoria, Department of Political Sciences according to the University data storage requirements.

If you have any questions, please do not hesitate to contact me, Cell +27 79 896 8406; Email: marlie.holtzhausen@up.ac.za. If you need to confirm, inquire or even register discomfort during the interview, please feel free to contact my supervisor Dr Cori Wielenga, Tel +27 12 420 4486; Email: cori.wielenga@up.ac.za.

I ……. hereby confirm that I understand the contents of this document and the nature of the research project, and I agree to participate in it as a respondent. I understand that participation on this project is voluntary, and that I am at liberty to withdraw from the project at any time without feeling obliged to provide a reason, or without incurring any disadvantage. I consent to this interview being recorded.

Signature of participant	Date
……..	…….
Researcher's signature	Date
……..	…….

Appendix 3: RPF SURVEY QUESTIONNAIRE

Relational Proximity Questionnaire and Guide (Part 1, Quantitative)

Respondent Information

Your Name:	JSEC Facilitator:
_____	_____
Organisation:	Survey number:
_____	_____
Your Title/Position:	Relationship(s) reviewed:
_____	_____

JAMES SOCIAL & ETHICAL CONSULTANCY

Stakeholder Relationship Assessment

The attached questionnaire forms part of JSEC's service offering under licence of Relational Analytics UK. It is intended to provide objective research into the management and risk assessment of strategic stakeholder relations. For the purposes of this exercise the questionnaire forms part of the research studies of Marlie Holtzhausen towards her PhD. The relations being measured relate to the James 1:27 Trust Secretariat and their key stakeholders. These include relations among the leadership of the Trust and its core staff, volunteers, Board of Trustees, sponsors and donors, regulator (DSD), and beneficiaries. The questionnaire consists of conducting a face to face interview where questions will be asked. Please take not of the following points to guide our interview:

1. Our objective is to measure the INTERPERSONAL RELATIONSHIPS between members within the different organisations because relationships are always based on people.
2. We trust that you will feel secure with us and have the liberty to be totally honest when completing this questionnaire. Your responses to this questionnaire will be presented anonymously, but please note that in some cases it will be possible to make an approximate guess on what your response might have been. However, we will not disclose your response to any one of the members of the team. It is the analysis and interpretation of your answers together with those of your colleagues and members of the other organisations that will inform the study.
3. We are using the Relational Proximity Framework developed by Relational Analytics, UK. This methodology is based on five domains and drivers namely, Communication (Directness), Time (Continuity), Information (Multiplexity), Power (Parity) and Purpose (Commonality). Each of these drivers are further sub-divided into four dimensions.
4. You should rate each pair of statements on a scale of 1 to 6 choosing the value that you believe is an accurate measure of your response to the questions as it relates to the person in question. **If you circle 4, 5 or 6 you are indicating more agreement with the statement on the right. If you circle 1, 2, 3 you are indicating more agreement with the statement on the left. Please remember to keep the specific relationships in mind each time you give an answer.** Please be encouraged to use the full scale (1-6) - this makes the results more meaningful.
5. Where necessary, you may add a comment or two to explain the rationale for your rating. Please keep such comments brief and succinct to allow me to capture them accurately.
6. Of the two statements, one is focusing on the positive and the other on the negative. I will always start with the positive statement, follow with the negative and then ask you to rate the relationship on the scale.
7. This interview is estimated to last 20 to 30 minutes.

Sample of questions:

	NEGATIVE/POOR							POSITIVE/GOOD
1	The relationship between us is too distant and lacks direct face-face contact and access							The relationship between us involves just the right amount of direct face to face contact and access
		1	2	3	4	5	6	
6	The relationship between us is not particularly conducive to building a relationship that will last over the long-term							The relationship between us is conducive to building a positive and long-term sense of connection.
		1	2	3	4	5	6	
11	The relationship between us is such that we describe and interpret the events that have happened between us in very different terms.							The relationship between us is such that we describe and interpret events that have happened between us in very similar terms.
		1	2	3	4	5	6	
16	The relationship between us has insufficient breadth for each side to understand and use the other's full range of skills, talents, resources or capabilities							The relationship between us enables both sides to understand and use the other's full range of skills, talents, resources or capabilities.
	a)	1	2	3	4	5	6	
21	The relationship between us results in one side doing an unfair share of the work							The relationship between us involves both sides doing their fair share of the work

		1	2	3	4	5	6	
26	The relationship between us involves few common interests and goals that would require contact and co-operation beyond the short-term.							The relationship between us involves significant common interests and goals that will require contact and co-operation for some considerable time to come
		1	2	3	4	5	6	
30	The relationship between us has no unity of purpose beyond simply achieving some minor results and goals							The relationship between us is based on a unity of purpose that goes beyond simply achieving results and goals
		1	2	3	4	5	6	

Appendix 4: INTERVIEW GUIDE

Semi-Structured Interview Questions and Guide

Project Title: From Washington Consensus towards a relational economy: Relational and human economy approach to addressing poverty and inequality in South Africa

University of Pretoria
Department of Political Sciences
PhD Candidate: Marlie Holtzhausen
Student number: 29148512
Email: marlie.holtzhausen@up.ac.za
Cell: +27 79 896 8406
Supervisor: Dr. Cori Wielenga (Email: cori.wielenga@up.ac.za)
Co-supervisor: Dr. Jason Musyoka (jasonmusyoka@gmail.com)

Respondent Information

Your Name: _____

Survey number: _____

Organisation: _____

Relationship reviewed: _____

Your Title/Position: _____

This is the second part of the interview which follows from the Relational interview questions. However, in the following questions I want your views on the impact (potentials and risks) of ideas and practices of the Trust on daily realities of people.

James 1:27 Trust	**Interviewees**	**Possible Interview Questions (human economy approach)**
Founder **CEO** **Social Worker** **Technical Support**	**Households**	-Tell me about your everyday life? -Tell me about your history with the Trust? -How do you relate to the Trust? -To what extent have your circumstances changed because of your interaction with the Trust? -Is there anything that you feel the Trust does differently from other organisations or places that you know of?

		-Are there places that you wish the Trust did not interfere in concerning your household or career? -Has there been decisions that the Trust has made which had negative implications on you and your household? Or interference? -What are the things that have changed you and your family's life (for better or worse)? -What do you think is needed in your community? -How do you use the resources that are here? -What would you do differently in the community? -How are you using what the Trust provides?
Founder **CEO** **Social Worker** **Technical Support**	**Sponsors** **Board** **Internal Staff** **"Services" Staff** **Community based Partner ("outsider perspective")** **Service providers** **Trust partners/sponsors (IT/back office)** **DSD - NACCA**	-Explain your relationship with the Trust -What are your reasons for interacting with the Trust? -In what ways would you say the Trust has been successful or where have they failed? -If the Trust had to scale what it is doing, what do you think are the biggest risks? -Why do you feel invested in what they are doing and developing? -How do you think they can contribute to address poverty and inequality? -What in your opinion is unique about the Trust?

Appendix 5: FOCUS GROUP GUIDE

Focus Group based on Relational Proximity Framework Survey
Project Title: From Washington Consensus towards a relational economy: Relational and Human Economy approach to addressing poverty and inequality in South Africa
University of Pretoria
Department of Political Sciences
PhD Candidate: Marlie Holtzhausen
Student number 29148512
Email: marlie.holtzhausen@up.ac.za
Cell: +27 79 896 8406
Supervisor: Dr. Cori Wielenga (Email: cori.wielenga@up.ac.za)
Co-supervisor: Dr. Jason Musyoka (jasonmusyoka@gmail.com)

Focus group sessions:

- Session 1 was a historical perspective of the Trust from the perspective of Trust staff. It included the Trust's view on the phases of the development of the organisation. Afterwards, household members could ask questions, comment and share from their perspective how they understand and view these developments.
- Session 2 continued to build on session 1 by talking through the key lessons learnt as an organisation from the various phases (positive and negative lessons).
- During Session 3, the facilitator asked all the participants (in mixed Trust-household mixed groups) to draw what the Trust represents to them as a group. The idea was to use metaphors to tap into how participants subjectively picture the Trust and as way to read into subtext.
- Session 4 was a feedback on the RPF results on the five Relational drivers and results. It was a very broad overview with overall scores of the Trust-household relationships. The drivers were workshopped further to get an overall sense of how the group interpreted the relational indicators within a group setting.

As already indicated in the informed consent, this interview is voluntary and if you feel uncomfortable, or you do not want to continue with the interview for whatever reason, please feel free to withdraw at any stage. I would also like to request for permission to record this interview, exclusively for the purpose of accurate capturing of all information you will provide. The recording will be treated with confidentiality, and will not be transferred to any third party, whatsoever. Would it be acceptable for me to record the interview?

Yes	Continue with interview and record.
No	Continue with Interview without recording but make notes.

Questions *based on the Relational Proximity Framework® survey and the relational assessment report. The results will be analysed, and questions will be developed based on the results and analysis. The results will reflect where the Trust is doing well or poorly relationally with other members and organisations. The questions aim to understand the deeper underlying reasons for the results based on the domains, drivers and dimensions of the relational assessment model:*

Driver	Sub-driver	Facets	Possible q's, examples
Directness	Quantity	Unmediated and mediated	Why do you feel that there is distance/good contact and access between you and the Trust?
	Quality	Functionality, style and tone	In what ways do you feel that the relationship between you and the Trust consists of communication that is open and transparent with a helpful style and tone/communication that leaves too much unsaid or where I am sure something is being hidden from me
	Sense of connection	Intellectual and emotional	How has this relationship between you and the Trust been

			conducive to building a positive and long-term sense of connection/ not particularly conducive to building a relationship that will last over the long-term
Continuity	Foundations	Duration and perception	Why would you say the relationship has a significant and positive history/ has no significant events that would help create a positive sense of history
	Anticipations	Stability and sustainability	The relationship between us is capable of surviving whatever difficult times lie ahead/ The relationship between us is unlikely to survive if the going gets rough
	Inclusion	Shared and roots	The relationship between us helps create a sense of inclusion, loyalty and commitment/

			The relationship between us does little to create a sense of inclusion, loyalty and commitment
Multiplexity	Breath	Variety of situation and variety of demands	The relationship between us provides opportunities for both sides to build a rounded (more accurate and complete) understanding of each other/ The relationship between us lacks sufficient opportunities for both sides to build a rounded understanding of each other
	Depth	Predicting and access	The relationship between us enables both sides to understand and use the other's full range of skills, talents, resources or capabilities/ The relationship between us has insufficient breadth for each side to understand and use the other's full

			range of skills, talents, resources or capabilities
	Appreciation	Knowing and being known	The relationship between us involves broad and full disclosure leading to deeper levels of understanding and trust/ The relationship between us involves insufficient disclosure for the development of a deep level of understanding and trust
Parity	Participation	Freedom and involvement	The relationship between us allows us to participate appropriately without reservation or anxiety/ The relationship between us makes it difficult to participate without reservation or anxiety
	Fairness	Fairness of activity and fairness of risk	The relationship between us involves both sides doing their fair share of the work/

			The relationship between us results in one side doing an unfair share of the work
	Mutual respect and value	Respecting and being respected	The relationship between us involves a real sense of being heard and valued/ The relationship between us involves a sense of being unheard and under-valued
Commonality	Alignment of goals	Focus on short term and focus on long term	The relationship between us involves significant common interests and goals that will require contact and co-operation for some considerable time to come/ The relationship between us involves few common interests and goals that would require contact and co-operation beyond the short-term.
	Overlap	Breadth and depth	The relationship between us demonstrates a strong

			commitment to common goals because both sides are putting in an appropriate level of time, energy and effort/ The relationship between us demonstrates a weak commitment to common goals because of the inadequate amount of time, energy and effort being put into it
	Unity	Synergy and unity	The relationship between us is based on a unity of purpose that goes beyond simply achieving results and goals/ The relationship between us has no unity of purpose beyond simply achieving some minor results and goals

Appendix 6: MULTIDIMENSIONAL POVERTY INDEX QUESTIONNAIRE GUIDE

Interview Guide to Households (Care)

Interview head of household or someone <18 responsible within household. Sample from:

- *1. James 1:27 Trust*
- *2. Households without any interventions from an NGO but in similar category as 1 and 2 (Section 6 on relationship with the NGO will not be answered by group 3).*

Respondent no ☐

Project Title: From Washington Consensus to relational economy: Relational and Human Economy approaches to addressing poverty and inequality in South Africa.

Good morning/afternoon. My name is Marlie Holtzhausen, a PhD student in the Department of Political Sciences at the University of Pretoria. As part of my research, I am conducting interviews on how Relational and Human Economy Approaches can inform and guide innovative ways of understanding and addressing poverty and inequality in South Africa.

Please tell me the following:

SECTION 1: History of household. Please provide some background. Who are you as household? Tell me about your history?

_____

_____

_____

_____

_____

SECTION 2: Demographics, education and health. Please provide a complete listing of all family members and other persons such as child or infants, domestic servants or friends who usually live here?

2.1. Name	2.2. Age	2.3. Gender	2.4. Education levels	2.5. Weight	2.6. Member sick in last	2.7. Frequency of use of	2.8. Birth and	2.9. Boys and

				kg/height cm	12 months and symptoms	health facility/clinic	death rates	girls who have died

(Questions below to capture in above table)

Education

2.4. Provide the levels of education of all household members. School grades, matriculated, tertiary education, diploma, other training (mention options such as some primary, primary completed, some secondary, secondary completed, some college/university, completed undergraduate degree (Specify), completed postgraduate degree (specify). Report card results for the last 12 months of children in the household if available.

Health

2.5. Check health of members of household by asking about weight in kg, height/length in cm, if information is available (To avoid ethics changes, Head of Household should be able to provide information).

2.6. In the last 12 months, how often did members of the household get sick? What is normally the reason or symptoms of sickness?

2.7. How often do members in this household see a health facility or clinic (weekly, monthly, quarterly, yearly, every five years, etc)?

2.8. Has anyone in the household ever given birth (women) to a son or daughter / fathered (men) a son or daughter who was born alive but later died? Interviewer Checkpoint: If no, probe – Any baby who cried or showed signs of life but did not survive?

2.9. How many boys have died? And how many girls have died?

SECTION 3: Household Income

3.1. What is the household income (Per capita income)?

_____

3.2. Where does the money come from (grants, employment, etc)?

_____

_____

3.3. If someone is employed, what are they doing? How did person(s) get the job? What are costs of transport to go to work versus income? How sustainable is the job?

_____

_____

_____

_____

3.4. What is your average monthly household expenditure? How is the money distributed within the household? (*Spending categories: groceries/food, transport, entertainment, etc?*)

_____

_____

_____

_____

SECTION 4: Living Standards *(make cross or underline if yes)*

4.1. House size and amount of rooms?	

4.2. How many people are currently staying in the house?	
4.3. Sharing of rooms, mattresses?	
4.4. House flooring?	Natural floor, Earth/sand, Dung, Rudimentary floor, Wood planks, Palm/bamboo, Finished floor Parquet or polished wood, Vinyl or asphalt strips, Ceramic tiles, Cement, Carpet, Other (specify).
4.5. Sanitation. What kind of toilet facility do members of your household usually use?	Flush to piped sewer system, Flush to septic tank, Flush to pit (latrine), Flush to somewhere else, Flush to unknown place/not sure/DK, Pit Latrine Ventilated Improved Pit latrine (VIP), Pit latrine with slab, Pit latrine without slab / open pit, Composting toilet, Bucket, Hanging toilet/hanging latrine, No facilities or bush or field, Other (specify).
4.6. Sanitation: Sharing Facility. Do you share this toilet facility with other households?	Yes / No
4.7. Cooking fuel. What type of fuel does your household mainly use for cooking?	Electricity, Liquid Propane Gas (LPG), Natural gas, Biogas, Kerosene, Coal/ Lignite, Charcoal, Wood, Straw/shrubs/grass, Agricultural crop, Animal dung, No Food Cooked in Household, Other (specify).
4.8. Primary source of drinking water. What is the main source of drinking water for the household members?	Piped water Piped into dwelling, Piped into yard or plot, Public tap/standpipe, Tubewell/borehole, Dug well, Protected well, Unprotected well, Water from spring Protected spring, Unprotected spring, Rainwater, Tanker-truck, Cart with small tank/drum, Surface water (river, stream, dam, lake, pond, canal, irrigation channel), Bottled Water, Other (specify).

4.9. Primary source of non-drinking water. What is the main source of water used by your household for other purposes such as cooking and handwashing?	Piped water Piped into dwelling, Piped into yard or plot, Public tap/standpipe, Tubewell/borehole, Dug well Protected well, Unprotected well, Water from spring Protected spring, Unprotected spring, Rainwater, Tanker-truck, Cart with small tank/drum, Surface water (river, stream, dam, lake, pond, canal, irrigation channel), Bottled Water, Other (specify).
4.10. Primary Source of Water: Distance to Water Source. How long does it take to get to the water source, get water and come back?	Minutes, Water on Premises, Don't Know
4.11. Assets. Does your household have:	Electricity, Radio, Refrigerator, Television, Non-mobile Telephone, Mobile Telephone, Bicycle, Motorbike/ Scooter, Car, Truck.

SECTION 5: Future prospect (researcher's own questions)

5.1. How do you feel about the future for you and the household? What aspirations do you have and how optimistic or pessimistic do you feel about achieving them?

_____

_____

_____

_____

5.2. What or who do you consider as your support structures and why?

_____

_____

_____

5.3. What are you doing well/successful as a household and where do you think you are failing? What are the biggest challenges and risks you face?

SECTION 6: Relationship with NGO (researcher's own questions)

6.1. What is your relationship with [NGO name]? *History, interventions, how households have been "approached" and methods used from head's perspective. Verify events, stories, interventions with what was explained by founder or care worker (triangulation) and whether from the head's perspective, certain interventions made a difference to the household (improvements made or not. How, why, what).*

6.2. Do you think [NGO name] has or can improve your households' outcomes and in what ways would you say it can/has/not? (*Testing whether they will mention improving relationships*).

_____

_____

_____

_____

6.3. Do you think that your relationship with (NGO) has made a significant difference to you and your household development? Positive or negative? In what way/how?

_____

_____

_____

_____

_____

Appendix 7: LETTER FROM CERTIFIED RELATIONAL PRACTITIONER AND SUPERVISOR

T.T. Marbach
68 Jasper Rd.
Doringkloof
Centurion 0157

Email: marbach@telkomsa.net
Cell: 082 504 9380

15 Feb 2019

TO WHOM IT MAY CONCERN

Re: Marlie Holtzhausen PhD

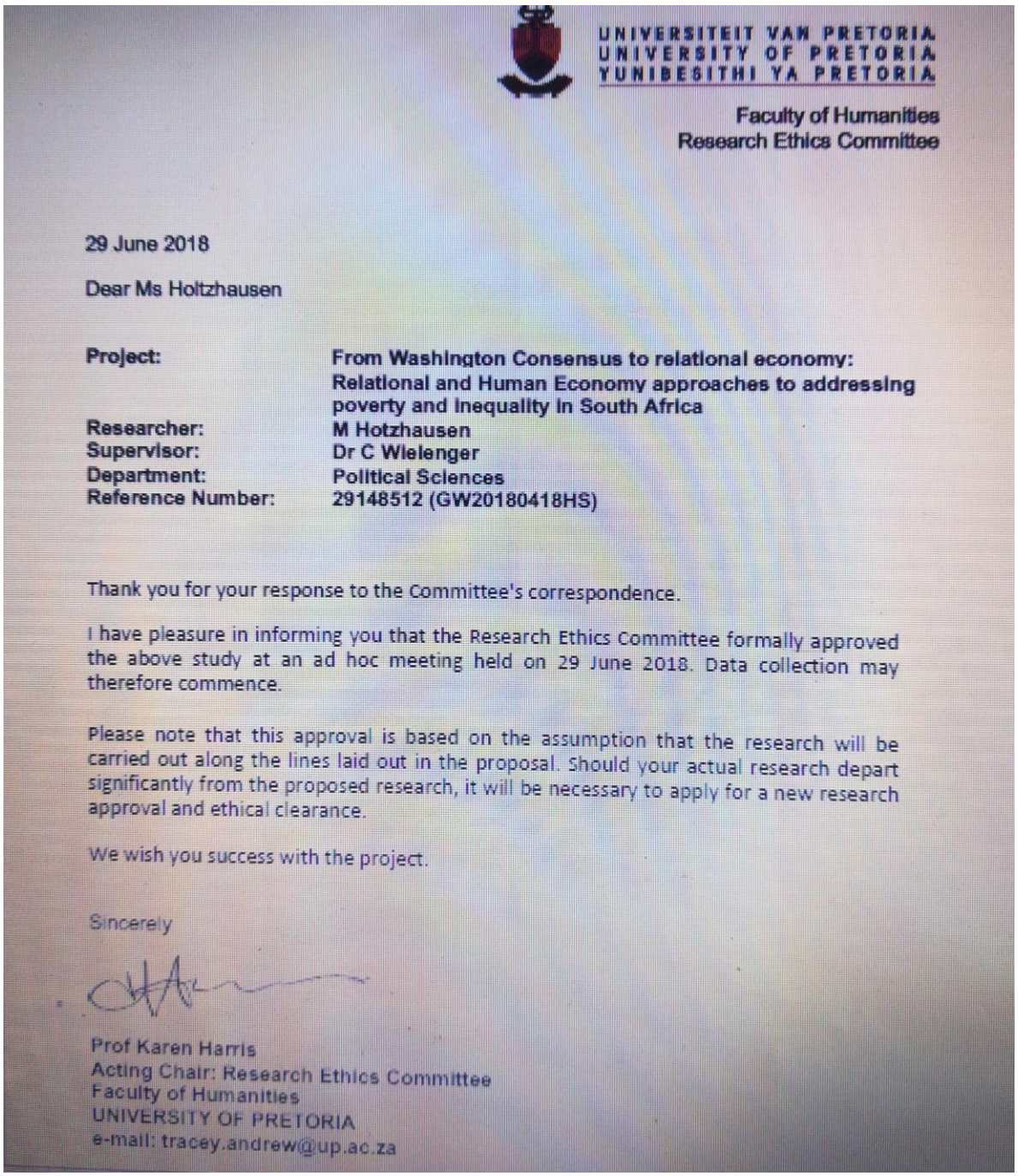
I have reviewed the data collected and processed as part of Marlie Holtzhausen's PhD fieldwork research ("From Washington Consensus to relational economy: Relational and Human Economy approaches to addressing poverty and inequality in South Africa").

In this work, she used the Relational Proximity® Framework as part of her fieldwork research on the James 1:27 Trust. This letter confirms that I believe her work is a faithful application of the framework, and the methodology she used to compute the results is in my opinion reliable.

The scope of my verification of her work relates to her data analysis, not the preceding data collection or the qualitative interpretation of results.

T.T. Marbach
Certified Relational Practitioner & Supervisor
(Relational Proximity® Framework)

Appendix 8: ETHICAL CLEARANCE LETTER



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Faculty of Humanities
Research Ethics Committee

29 June 2018

Dear Ms Holtzhausen

Project:	**From Washington Consensus to relational economy: Relational and Human Economy approaches to addressing poverty and inequality in South Africa**
Researcher:	**M Hotzhausen**
Supervisor:	**Dr C Wielenger**
Department:	**Political Sciences**
Reference Number:	**29148512 (GW20180418HS)**

Thank you for your response to the Committee's correspondence.

I have pleasure in informing you that the Research Ethics Committee formally approved the above study at an ad hoc meeting held on 29 June 2018. Data collection may therefore commence.

Please note that this approval is based on the assumption that the research will be carried out along the lines laid out in the proposal. Should your actual research depart significantly from the proposed research, it will be necessary to apply for a new research approval and ethical clearance.

We wish you success with the project.

Sincerely

Prof Karen Harris
Acting Chair: Research Ethics Committee
Faculty of Humanities
UNIVERSITY OF PRETORIA
e-mail: tracey.andrew@up.ac.za