VICTORIA UNIVERSITY

MELBOURNE AUSTRALIA

Quality of work life on participant workers employed in social enterprises in Jamaica and

its impact on experiences of social inclusion.

Thesis submitted in fulfilment of the requirements for the degree of

Doctor of Business Administration

College of Business

Victoria University

Melbourne Australia

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June 2017

Abstract

This research examines participant workers' experiences of social inclusion and quality of work life while employed at social enterprises in Jamaica. Social enterprises have been promoted as a panacea for society's ills, such as social exclusion. Jamaica has limited safety nets, high rates of poverty and an inadequately funded public education and healthcare system. There are some 4,000 social enterprises in operation, focused on community empowerment, economic prosperity, community safety and stewardship.
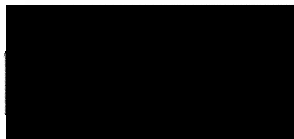
To explore this issue, the research develops a theoretical framework, the access-participation-empowerment model (APE), based on Gidley et al's (2010) model of social inclusion interventions nested within the ideological underpinnings of neoliberalism, social justice and human potential. This thesis takes a case study approach. The data sources comprise semi-structured interviews, examination of company documents and articles, a review of the literature and direct observations. Interviews were conducted with 16 participant workers, management and stakeholders of two social enterprises located in urban and rural Jamaica. This thesis takes a novel approach in engaging with marginalised participant workers. Their lived experience is recorded and shared, with the intention to expose the structural inequalities they face and to enable academics, practitioners and policymakers to inform, modify or restructure their practices and policies.

The research explains that social inclusion and quality of work life is experienced in three ways. First, access means being financially independent, and having control over one's finances, regardless of how little is earned. Second, it is experienced through participation in community activities, the ability to make decisions in the workplace and improved personal relationships. Finally, it is experienced by engaging with exclusionary agents on an individual level and having one's voice heard. The research did not find that social enterprises challenge or remove structural exclusion or institutional barriers.

Declaration

I, Erica Myers-Davis, declare that the DBA thesis entitled "*Quality of work life on participant workers employed in social enterprises in Jamaica and its impact on experiences of social inclusion* is no more than 65,000 words in length including quotes and exclusive of tables, figures appendices and references. This thesis contains no material that has been submitted previously in whole or in part, for the award of any other degree or diploma. Except where otherwise indicated, this thesis is my own work.

Signature　　　　　　　　　　　　　　**Date 22 June 2017**

Acknowledgements

"A people without the knowledge of their past history, origin, and culture is like a tree

without roots."

Marcus Garvey

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List of Abbreviations

APE	Access-participation-empowerment model
CIC	Community Interest Company
DCFS	Department of Co-operatives and Friendly Societies
GCT	Goods and Consumption Tax
GDP	Gross Domestic Product
IMF	International Monetary Fund
JLP	Jamaica Labour Party
JNBS	Jamaica National Building Society
PNP	People's National Party
QWL	Quality of Work Life
RADA	Rural Agricultural Development Authority
SEBI	Social Enterprise Boost Initiative
SPS	Structured Pragmatic Situational Approach
SRC	Scientific Research Council
SWOT	Strengths, Weakness, Opportunity and Threats analysis
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organisation
USA	United States of America
US AID	United States Agency for International Development

CHAPTER 1   INTRODUCTION

In 2000 the United Nations brought international attention to global poverty through its Millennium Development Goals, as more than 2 billion people live on less than US$2 a day (WorldBank 2015). Those experiencing poverty face starvation, limited access to potable water, inadequate sanitation and scant accommodation or overcrowding, along with limited healthcare and education. Aside from its deleterious impact on the impoverished, poverty impacts the wider society through the acts of crime and terrorism it engenders (Alvarez, Barney & Newman 2015). This level of poverty has not improved after three decades of neoliberalism and has in fact been exacerbated by the imposition of structural adjustment programs on developing countries (Fukuda-Parr 2003; Kerlin 2013; Lund 2002); it has led to a surge of initiatives by not-for-profit organisations, voluntary associations and individuals to solve major social issues using market-based activity (Alvarez, Barney & Newman 2015; Borzaga & Defourny 2001) to augment and in some cases, replace withdrawn or reduced government and philanthropic funding. From a neoliberal perspective, philanthropy is not viewed as a sustainable solution as it does not generate capital, whereas using the market can create an economically sustainable alleviation of poverty (London 2008). These activities use a variety of strategies to engage those experiencing disadvantage, such as providing them with access to credit or asset-building instruments (Cooney & Shanks 2010) through microfinance programs, establishing property rights, base-of-the-pyramid initiatives (Alvarez, Barney & Newman 2015) and removing barriers to employment and social exclusion through entities such as social enterprises (Barraket & Archer 2010; Pearson & Helms 2013).

In this climate, social enterprises have been developed as a strategy to alleviate poverty and create social inclusion opportunities for people experiencing social and/or economic disadvantage. On the surface, social enterprises appear to offer grassroots solutions to local social problems. However, much of the literature is focused on social enterprises operating in developed countries with limited focus on developing countries where poverty

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still remains a significant issue. In addition there is little research on the impact of social enterprises on the lives of their beneficiaries who are employed as participant workers. This study is located in Jamaica and examines how participant workers employed in social enterprises experience social inclusion and quality of work life.

There are restrictions to the data set used in this thesis: eleven research participants were participant workers in social enterprises; the remaining five participants - funders, researchers and stakeholders of the social enterprises - participated in semi-structured interviews. Using a case study approach, this research focuses on two social enterprises domiciled in Jamaica and incorporates ethnographic elements, observation and a review of the literature.

This chapter discusses the objectives, significance and justification of the study and introduces the research question and the main contexts and themes of this study. It introduces social enterprises, provides an overview of social inclusion and determines the need for an examination of participation and work. Finally the chapter concludes with an outline of the remaining six chapters in the thesis.

1.1   Objectives of the thesis

Broadly, this thesis investigates how participant workers experience access (economic inclusion), participation and empowerment while employed by social enterprises in Jamaica. The intention is to provide a better understanding of the way in which work in social enterprises can be arranged to improve social inclusion and quality of work life, and to create real empowerment for participant workers.

Social enterprises are organisational hybrids as they fuse characteristics from both non-profit and commercial organisations, as described by Dees (1998) in his social enterprise spectrum. Thus they are able to exploit philanthropic goodwill in order to secure low-cost resources such as donations, volunteer labour and discounted supplies, whilst being market-driven and motivated by their own self-interest. Social enterprises provide an alternative employment option for people who have been excluded from the traditional

labour market due to their gender, age, disability, economic status, lack of educational attainment or criminal history. A preliminary discussion of social enterprises is provided in section 1.6.4; however a more comprehensive examination is provided in Chapter 3. As there are a wide variety of social enterprises, it is important to note that this study is focused specifically on work integrated social enterprises (WISEs) which offer employment and training opportunities for those excluded from the labour market. This thesis is the first of its type to identify, using an access-participation-empowerment model, how participant workers employed in social enterprises experience quality of work life and social inclusion.

1.2   Significance of the thesis

This research will provide an understanding of the factors that can empower participant workers and thus improve their quality of work life and social inclusion. In doing so, it will enable academics, practitioners and policymakers to inform, modify or restructure their practices and policies. The process of valuing, recording and tapping into the lived experience of people experiencing deprivation and social exclusion (Shivarajan & Srinivasan 2013) allows for the integration of their knowledge and wisdom into current practice and thinking. The research seeks to encourage appropriate investment in social enterprises that support excluded or marginalised communities, whether through grant funding, easier access to capital, or reductions in red tape. Additionally it aims to shine a light on the structural inequalities these entities and participant workers face. This thesis is significant in that it utilises an access-participation-empowerment framework to understand how social enterprises contribute to the creation of genuine empowerment, beyond the traditional neoliberal access model of economic inclusion and social justice ideology of participation.

1.3   Contribution to knowledge

As will be discussed in more detail in Chapter 4, the subject of social enterprise is an emergent field. While the UK and USA remain at the forefront of the literature, research on

social enterprises within developing countries is negligible (Granados et al. 2011). This thesis aims to contribute to the literature on social enterprises in general, and particularly within the context of a developing country. Further, this research adds specifically to the knowledge regarding the empowerment of participant workers engaged at WISEs and to the body of literature regarding quality of work life and social inclusion.

Central to WISEs are the participant workers who benefit from this type of employment arrangement. This research not only shares their voices and lived experience, but also identifies the factors which contribute to their sense of social inclusion and quality of work life.

By taking a practical approach, this thesis provides practitioners with a framework within which to investigate and evaluate how participant workers experience access, participation and empowerment.

1.4   Rationale for Topic Selection

The rationale to examine this topic *quality of work life and experiences of social inclusion for participant workers employed in work integrated social inclusions* was driven by the researcher's experience of working with people excluded from mainstream employment and participating in two social enterprises she was managing in Melbourne. These enterprises provided training and employment opportunities for two cohorts - people living with, or recovering from, a mental illness, and the long-term unemployed. The researcher saw first-hand the positive impact of employment on participant workers. For the vast majority of them, the opportunity to get up and go to work, have something to do, be relied on and needed, make decisions, talk to customers and belong to a community, saved them from a life of isolation and exclusion. In some cases, it prevented them from re-attempting suicide, but in all cases they experienced hope and started envisioning a better future for themselves. However, despite all the benefits, these workers, who were also welfare recipients, faced significant institutional and societal obstacles, stigma and political demonisation. In addition, with the dominance of neoliberalism, funders and other

stakeholders appeared preoccupied with the economic bottom line and return on investment or would pat themselves on the back for 'doing good', rather than advocating structural change, or a redistribution of power that would benefit participants. In short, institutional stakeholders viewed social enterprises as businesses that should be profitable and put the responsibility on the participants to work their own way out of their situation. This, in turn, created immense pressure on participant workers and shifted the focus to the achievement of financial targets rather than qualitative outcomes that would ultimately profit both society and individuals over the long term. Funders and other stakeholders had never experienced mental illness or long-term unemployment, but their well-meaning agendas were given precedence, often at the expense of participant workers, who were not empowered to challenge the structures within which they were bound.

In learning that the Foundation of the researcher's former employer, Jamaica National Building Society (JNBS), had been granted US$1million dollars to fund a business incubator program for social enterprises, the researcher was intrigued by the provision of this grant. JNBS is an indigenous financial institution operating in Jamaica. Its core business is the provision of home loans and it has 51 per cent market share of the mortgage loan market in Jamaica (Jamaica National Building Society 2013a). It was originally established as the Westmoreland Building Society in 1874 to assist families, after the abolition of slavery, to purchase their own homes. Since 1967 it has grown through a series of mergers and acquisitions and is now a mutual association wholly owned by its members. The researcher is a former general manager of their UK remittance operation. JNBS, through its foundation (JN Foundation), provided access to the social enterprises in this study.

As will be explored in Chapter 2, Jamaica is a country that differs significantly from developed countries. It has limited state safety nets, high numbers living in poverty, and inadequately funded public education and healthcare programs. It also has a brutal history of colonial oppression, matched with equally bloody resistance. On discovering the number of social enterprises operating in Jamaica and the significance of this third sector to the

economy, the researcher was interested in gaining a better understanding of their role as a community intervention strategy and in empowering participant workers. With the research on social enterprises dominated by the UK and the USA (Granados et al. 2011), it was possible there were insights that could be gleaned from a developing country, which could translate into useful practice and knowledge for social enterprises in developed countries such as Australia

1.5   Guiding research approach

The research is exploratory and utilises a case study approach. The methodology is discussed in detail in Chapter 5. The research question is answered within the context of social enterprises based in rural and urban Jamaica and viewed through the lens of the access-participation-empowerment model. These factors are expressed and determined by participant workers, supported by their stakeholders. They are contextual, subject not just to the theory and practice but also specific to the type of enterprise, the exclusion that is being addressed and the socio-political and economic climate of Jamaica.

1.6   Main concepts and themes

Chapters 2 and 3 examine the socio-political and economic background to Jamaica and social enterprises. Chapter 4 investigates social exclusion, social inclusion, and quality of work life in detail. What follows is an introductory discussion on the aforementioned concepts and themes.

1.6.1   Jamaica

An island nation that occupies 11,213 square kilometres in the Caribbean Sea (Ghartey & Amonde 2013), Jamaica is the third largest in size, and largest English-speaking island, in the Caribbean, with a population of 2.9 million people. As a developing country it is burdened with poverty and disadvantage. More than 40 per cent of the population earn less than US$2.50 a day (International Monetary Fund 2011) and over the last two

decades its stagnant economy has grown by less than one per cent each year. These challenges, along with high unemployment and underemployment, have fostered a high crime rate which is linked to the international drugs trade. Jamaica is an intermediate destination for cocaine from South American into North America and Europe (CIA 2016). Another serious challenge to Jamaica's economy is its burdensome public debt. Jamaica has a debt-to-GDP ratio of 130.7 per cent (Ghartey & Amonde 2013). Since the 1970s the country has had to borrow from multilateral entities such as the International Monetary Fund and World Bank. In return these entities have, through structural adjustment programmes, compelled successive Jamaican governments to open its markets, remove tariffs and labour protections and reform its taxation and banking systems. In an attempt to reduce its debt, in 2010 and 2012 the government introduced a National Debt Exchange program to withdraw domestic bonds and reduce debt servicing. In 2012 the island's financial institutions were forced to participate in this program which saw them forfeit billions of Jamaican dollars from their reserves and in receivables owed by the government. This has seen the Jamaican dollar devalue by nearly 7 per cent against the US dollar (Jamaica National Building Society 2012a).

1.6.2   Social Enterprises

While there is currently no consensus within the literature that is reviewed in Chapter 3, on the definition of a social enterprise (Alvarez, Barney & Newman 2015; Granados et al. 2011; Trivedi & Stokols 2011; Williams, Densil A & K'nife 2012), they are often described as organisations that address social problems by relying not on traditional philanthropy but on the use of commercial activities to generate income (Madill, Brouard & Hebb 2010). Unlike traditional businesses that seek to recruit the most talented and experienced personnel, social enterprises often recruit the low- or non-skilled, long-term unemployed, former convicts, those with intellectual or physical disabilities or those who face exclusion from the traditional labour market due to their health, gender, ethnicity or age (Peattie & Morley 2008). Social enterprises offer their participant workers access to training and

employment pathways, increase their workforce participation, increase their self-esteem, and reduce substance abuse and welfare dependency (Barraket & Archer 2010; Pearson & Helms 2013). Furthermore social enterprises also have a community or societal effect as they can help build social capital, broaden social contact, increase civic participation, restore civic and public spaces, provide leisure opportunities and, importantly, stimulate local economies (Barraket & Archer 2010). Another unique characteristic of social enterprises is that they seek "to deliberately enfranchise excluded groups…so that they can participate not only in a market economy but also in the deliberation processes that shape their future" (Ridley-Duff 2007, p. 389). Social enterprises take a variety of legal forms and can be established as companies limited by shares or by guarantee, incorporated associations, industrial and provident societies, sole traders, registered charities and partnerships. In this study, social enterprises are defined as organisations that address social problems, generate income through commercial activities, are eligible to receive philanthropic or government grants to subsidise their mission and deliberately recruit a workforce that includes personnel who have been excluded from the mainstream labour market.

1.6.3   Social Inclusion

Chapter 4 (section 4.2) offers a review of the literature on social inclusion and exclusion. Although the concepts of social exclusion and inclusion appear intrinsically symbiotic, social exclusion is typically associated with deprivation, poverty and inequality (Shivarajan & Srinivasan 2013; Wright & Stickley 2013), while social inclusion is concerned with integration and participation (Martin & Cobigo 2011). Social inclusion offers individuals the opportunity to feel connected by a sense of belonging to their community and to develop their abilities, which ultimately leads to satisfaction in their lives (Hall 2009).

Teasdale (2010) identifies four dimensions that individuals need to be engaged in to be considered socially included: (1) ability to purchase goods and services; (2) participation in socially valuable activities; (3) involvement in local or national decision making and social

interaction; and (4) integration with the family, friends and the community. Teerakul et al. (2012) build on and expand these dimensions to create a more comprehensive framework which subdivides socio-economic disadvantage into material deprivation, which encompasses household assets, income and consumption expenditure, and social deprivation, which incorporates basic needs, social participation, vulnerability, empowerment and happiness.

Hall (2009) describes six areas within social life domains that are central for individuals with disabilities to experience social inclusion: (1) being accepted and recognised as an individual, rather than by their disability; (2) having reciprocal interpersonal relationships; (3) participation in recreational activities; (4) having appropriate living accommodations; (5) being in employment; and (6) receiving formal and informal supports.

Gidley, JM et al (2010) take a different approach and present social inclusion through three ideologies of neoliberalism, social justice and human potential. Neoliberalism narrowly views social inclusion through an economic lens, thus as economic inclusion. Social justice considers equity, participation and equal opportunities for all. Human potential moves beyond these two models and is viewed as empowerment, as it enables transformation and a shifting of power dynamics.

1.6.4 Quality of Work Life

The literature on quality of work life is reviewed in Chapter 4, (section 4.3) and argues that it is a multifaceted concept that considers both the extrinsic aspects of employment such as the broader work environment, job requirements and worker characteristics, and intrinsic elements, based on the individual worker's evaluation of these factors (Tongo 2015). Other aspects of quality of work life include wages, work conditions, career prospects, workplace health and safety, job stress, relationships between colleagues and supervisors, attitude and behaviour of management towards workers and worker participation in organisational decision making (Rai 2015; Singhai & Garg 2014; Sundaray, Sahoo & Tripathy 2013). Quality of work life affects society, as it can lead to increased

motivation and satisfaction for the worker, in turn creating better efficiencies and productivity, lower staff turnover and absenteeism and higher customer satisfaction, all of which ultimately benefit the economy (Bednarska, Olszewski & Szutowski 2013; Sundaray, Sahoo & Tripathy 2013). For the employing organisation, good quality of work life ensures retention of workers and helps to attract new employees (Sundaray, Sahoo & Tripathy 2013). The impact of good quality of work life on the worker leads to a broader life satisfaction in the domains of social, leisure and family and has an overall positive impact on mental and physical wellbeing (Tongo 2015; Villotti et al. 2012). Good quality of work life encourages job satisfaction, which in turn enables employees to enjoy their life and has the benefit of creating organisational efficiency and profitability (Sundaray, Sahoo & Tripathy 2013).

1.7 Structure of the thesis

This chapter has provided an introduction to the thesis and placed the research within the context of Jamaican social enterprises and their impact on participant workers' experiences of social inclusion and quality of work life. An outline was presented for the rationale for the topic and the researcher's motivation to examine this subject, along with the research propositions, the objectives of the thesis and its significance and contribution to the literature.

Chapter 2 presents the historical, social, economic and political context of Jamaica. The history of social enterprises is examined, along with their typology, structures and governance in Chapter 3. In Chapter 4, the literature on concepts of social exclusion, social inclusion and quality of work life is reviewed, culminating in the conceptual framework – the access-participation-empowerment model. Chapter 5 outlines the methodology. Chapter 6 presents the findings from the investigations of the case studies. The thesis concludes in Chapter 7 with a discussion of the research findings and their implications, a consideration of the contribution made by the research, recommendations for future research and practice and a personal reflection from the researcher.

CHAPTER 2   JAMAICA

This chapter considers the core structural factors that may have an influence on this research study. The purpose of this chapter is to understand the historical, economic, political and social context that Jamaicans must operate in. The first section outlines Jamaica's history, then it turns to the economy, and examines the labour market, social exclusion and national debt. The next section explores Jamaica's colonial and post-colonial politics followed by a discussion on social and cultural issues. The chapter ends with an investigation into crime gangs that proliferate the island and beyond and their impact on society.

2.1   History

Prior to European colonisation, the island was inhabited by the Taino, a subgroup of the Arawak from eastern South America who occupied the Greater Antilles. Christopher Columbus landed in Jamaica on 14 May 1494, naming the island Santiago (Saint-James) which was never formally adopted. Instead the island kept its indigenous name of Xaymaca meaning 'land of wood and water', of which 'Jamaica' is a corruption. Within a century of European arrival, the majority of the Taino had been massacred. The death of these people through colonial brutality and disease became the impetus for the transatlantic slave trade. Spain developed the colony through the use of slave labour, trafficking Africans from their homelands, but with the tension in Europe of the Anglo-Spanish War and the Thirty Years' War, England seized the island in 1655.

The new colony became central to the English economy and revolved around exported sugar cane and by-products such as rum (Johnson & Bartlett 2013). The sugar trade created a massive concentration of wealth, assets and opportunity for a minority of the population – the planter oligarchy, white, British plantation owners and management. In fact Jamaica became Britain's jewel in the crown so that by 1774 its wealth per capita exceeded that of the American colonies by a factor ranging from 1.5 to 2.3. However by

the nineteenth century the colony was pummelled by cheaper products from European beet sugar producers driving Jamaican sugar prices down (Tindigarukayo 2014). Although slavery was abolished in 1834 the legacy of slavery and the socio-economic vestiges of the plantation economy still remain (Elliott & Palmer 2008; Johnson & Bartlett 2013; Welsh 2012). The power and wealth from the plantations was simply transferred to the elites, who still continue to benefit from the structural inequality embedded in the class system. Upon independence in 1962 Jamaica retained the Westminster and monarchical system, which is represented by a Governor General, presently Sir Patrick Allen. The country is currently governed by the Jamaica Labour Party who assumed office on 3 March 2016.

Today, with its tiny population of less than three million, Jamaica is a developing country that is part of the Commonwealth. The island remains vulnerable both to economic shocks with its devalued currency and high unemployment, as well as to environmental devastation, given its location in 'Hurricane Alley'.

2.2   Economy

During the pre-independence and post war years, agriculture, mining, manufacturing and tourism were key industries that were in balance and sustainable (Clarke & Howard 2006). In 1960 its per capita GDP was $6,417 and its economy relied on agriculture, bauxite and tourism. Within two decades bauxite had started to decline while tourism, agriculture, manufacturing and remittances had increased. Fifty years on, in 2010, the economy relied heavily on services (60% of GDP), remittances (15%) and tourism (15%) and its GDP per capita had risen marginally to just $8,539. This is in stark contrast to a similar, small island nation and former British colony - Singapore - whose GDP per capita in 1960 was $4,383 but in 2010 had grown exponentially to $55,862 (Welsh 2012).

Although it is the largest English speaking island in the region, economically Jamaica has lagged behind the rest of the Caribbean as its economy grew just three per cent between 1990 and 2005. Jamaica's economy had been protected from imports but structural

adjustment programmes removed its tariffs, devalued the currency, curbed trade union activity and flooded the market with imports (Clarke & Howard 2006).

In 2013 the Jamaican economy grew by less than one per cent, with inflation at 8.3 per cent (Jamaica National Building Society 2013a). This poor growth rate is due to a low skilled workforce, low participation rates in the formal labour market, high unemployment, external financial and environmental shocks and high consumption of imported goods (Clarke & Howard 2006; Thomas, D & Serju 2009). Furthermore the Jamaican government has significant obligations under an International Monetary Fund (IMF) loan agreement, as the country has extensive debts and has been compelled to establish a National Debt Exchange program to service its loans which will be discussed in section 2.2.3.

2.2.1 Financial Sector

Prior to 1962 all five banks were foreign-owned, in 1977 the government acquired and operated one bank. However in the mid-1980s, driven by the structural adjustments programmes of the World Bank and the IMF, the financial sector was liberalised. During this period there was a significant increase in domestic lending to the private sector for consumer-orientated activities, with minimal assessment and collateral secured. These high-risk loans proved unprofitable and helped trigger the financial crisis of 1995. The crisis reinforced the perception that indigenous banks and financial institutions were weak, sending consumers in their droves to deposit their savings and earnings with foreign-owned banks, further compounding the issue. The government response led to the creation of two regulatory bodies - the Financial Institutions Services and the Financial Sector Adjustment Company - charged with reorganising the sector. These institutions were able to successfully resolve the crisis within five years of coming into force. Today, the Bank of Jamaica supervises deposit-taking institutions and the Financial Services Commission oversees securities, insurance and pension industries. In May 2016 there were six commercial banks, three building societies, two merchant banks, 422 remittance locations and 58 cambios under the supervision of the Bank of Jamaica (Bank of Jamaica 2016) along with 34 credit unions.

2.2.2 Sources of Revenue

Figure 1: The beach at Boston Bay, Portland

(source: Erica Myers-Davis)

With its white sandy beaches, turquoise waters and lush green interior, Jamaica is the epitome of the 'sun, sea, sand' holiday. Jamaica's tourism sector has its origins in the late seventeenth century, intensifying in the nineteenth century with advances in mechanised transportation and the concept of the holiday and 'winter health spa' to escape the stresses of the Industrial Revolution (Taylor 2001). Airline travel and the building of two airports in the twentieth century further developed tourism. In 1955 a Tourism Board was established and by the mid-1970s the government was focusing on tourism as a means of increasing employment. In the 1980s a separate Ministry for Tourism was created. A unique aspect of Jamaican tourism is the "all-inclusive", said to have originated in Jamaica at the Frenchman's Cove Hotel in 1962 (Frenchman's Cove 2016) and further refined in the 1980s by the Sandals Resorts (Kingsbury 2011). All-inclusive resorts include all meals,

drinks and other services in the price, a boon as tourists to Jamaica are price-sensitive, and are attracted by low price and value for money holidays (Williams, Densil A. & Spencer 2010).

In 2008 Jamaica hosted 1.8million tourists (Singh et al. 2010) who spent between US$94 and US$120 each (Williams, Densil A. & Spencer 2010). Presently tourism revenue represents 25.6 per cent of GDP and, through its multiplier effect, creates 24 per cent of all jobs. Thus, tourism creates direct employment for tour guides and airline, accommodation, government ministry and hospitality workers, and indirect employment via agriculture, manufacturing, banking, and conservation sectors. It also generates significant foreign exchange revenue (Johnson & Bartlett 2013). However Singh et al. (2010) argue that tourism in Jamaica does not create or drive economic growth as there is no overarching strategic plan, notwithstanding the government's goals of foreign exchange revenues and employment creation. They point to the lack of integration of tourism within the broader economy and recommend an increase in Jamaica's offerings to move from the beach model towards consumer trends in experiential holidays. In response the government has developed a National Growth Strategy with a priority to expand the tourism sector (Pearcy & Lester 2012).

Bauxite, an aluminium ore, is the world's main source of aluminium. Jamaica's bauxite deposits, which are principally found in the parishes of St Ann, Trelawny, Manchester and St Elizabeth, were discovered in 1869 by geologists. However it wasn't until 1942 that the commercial potential of alumina was appreciated when landowner Sir Alfred D'Costa sent soil samples for analysis to the Imperial Institute in London. The findings of significantly high alumina content were brought to the attention of Canadian geologists at Aluminium Limited who estimated Jamaica's bauxite's reserves in 1953 to exceed 500 million tons, 12 per cent of the world's reserve. Understanding the economic potential, the government instituted the Minerals Vesting Law and Mining Act 1947 and the Bauxite and Alumina Industries Encouragement Law 1950. Bauxite mining enabled the government to diversify its income and by the mid-1960s, earnings were US$20 million per annum (Young 1965).

During the 1970s earning revenues of mining companies came under government scrutiny. The Manley government put regulation of the bauxite industry high on its agenda with the creation of a National Bauxite Commission in 1972 and an industry monitoring unit, the Jamaica Bauxite Institute. The government acquired 51 per cent ownership of all mining and processing operations, secured reparation of lands owned by foreign companies and levied tax increases on the ore itself . By 1974 Jamaica was the world's second largest producer of bauxite and exporter of alumina and the levy generated a significant windfall for the government; however it also raised the cost of mining. Subsequently Jamaican bauxite became the most expensive to extract in the world, leading to the collapse and departure of several mining companies. In 2008 Jamaica earned US$1.37 billion in gross revenues, but after the closures of Windalco and Alpart revenue had decreased by US$500 million (Neita). Today Jamaica produces seven per cent of the world's bauxite. Remittances are a critical part of the economy, representing about 15 per cent of GDP and placing Jamaica 16th in the world for remittance income (Beuermann, Ruprah & Sierra 2016; Welsh 2012). Some 60 per cent of Jamaicans receive remittances from family members who are migrants, temporary workers or naturalised citizens residing principally in the United States, Canada and the United Kingdom. Beuermann, Ruprah and Sierra (2016) note that remittances act as a social insurance, particularly for vulnerable people. The researcher's own perception as a former executive in the remittance sector was that money transfers were seen as a lifeline and safety net for impoverished families back home

2.2.1   Debt

Jamaica is one of the world's most indebted countries with 40 per cent of its GDP used to service debt (Edmonds 2016; Thomas, D & Serju 2009). In 2007 it had a debt-to-GDP ratio of 130.7 per cent (Ghartey & Amonde 2013). The debt is owed to multilateral and bilateral entities such as the World Bank and the IMF, rather than to commercial banks (Huber & Stephens 1992). Increased government borrowing occurred during the OPEC oil crisis in

the 1970s, which exponentially raised the prices of fuel, on which Jamaica was dependent for electricity generation, resulting in a massive trade imbalance (Clarke & Howard 2006; Edmonds 2016). This period, when the government was seeking to nationalise and own its own resources under the banner of democratic socialism, saw the wholesale departure of foreign investment from the island.

With an already vulnerable economy and the withdrawal of foreign capital, the government was obliged to apply for its first structural adjustment loan from the IMF in 1977. The IMF imposed a series of austerity measures, while the international financial community pushed its neoliberal agenda (Huber & Stephens 1992). Jamaica was required to implement tariff cuts, privatise state-owned entities, and undertake labour market reform in the guise of cutbacks to the civil service with the flow-on effect of a reduction in public services and devaluation of the Jamaican dollar (Clarke & Howard 2006; Edmonds 2016). The impact was devastating. Women and children suffered the most through the wholesale cuts in welfare and nutrition programmes. More broadly, Jamaican society witnessed steep increases in the cost of living and high unemployment. In the 1980s the structural adjustment programmes saw the creation of a Freeport manufacturing zone in Newport West. Foreign-owned garment factories employed 8,000 people in unprotected jobs, working in sweat shop conditions, producing garments for the American market, but they closed down a decade later.

By 1989 the government had taken five more IMF loans and debt had doubled to US$4.4billion, or US$1,800 for each citizen (Edmonds 2016). In 2012 the island's financial institutions were forced to participate in the National Debt Exchange program which saw them forfeit billions of their reserves and receivables owed by the government. This caused the Jamaican dollar to devalue by nearly seven per cent against the US dollar (Jamaica National Building Society 2012b).

2.2.2 Labour

Through the vestiges of colonialism and its de jure racial separation, occupation is an indicator of social class. The elites are legislators, officials and professionals, who comprise 10 per cent of the labour force. The middle class, 34 per cent of the labour force, are the technicians, associate professionals and clerks, while the remaining 56 per cent constitute the lower class. In 1960, pre-independence, the elites comprised 5 per cent, the middle class 25 per cent and the lower class 70 per cent. The elite and middle class have expanded due to the increase in educational opportunities and work in bureaucracy (Clarke & Howard 2006).

Jamaica has an ageing population with a declining number of children per household, from 1.1 in 2003 to 0.9 in 2012. Its capital, Kingston, has the largest working age population (aged 15-64) and rural areas have the largest proportion of older residents (those aged above 65 years). Nearly half all of households have a female head (45.6 per cent) of which more than half of these (53.4 per cent) have children with no man is present (Planning Institute of Jamaica 2012). This suggests that a significant number of women, rather than men are bearing the burden of social and economic responsibilities in their communities. Although the adult literacy rate in 2009 was 86 per cent (Welsh 2012) unemployment for women is one and half times higher than for men. Overcrowded Kingston has particularly high rates of unemployment, particularly in poorer areas and amongst young people (Clarke & Howard 2006). During the post-war years, unemployment for men was 16 per cent and 18 per cent for women; by 1983 it had risen to 21 per cent for men and 35 per cent for women. But while the rate dropped in 1989, under structural adjustment, to 11 per cent for men and 22 per cent for women, the participation in work decreased from 84 per cent to 78 per cent for men, and 71 per cent to 64 per cent for women, from 1983 to 1989. A possible inference is that people were not interested in working, either because it was poorly paid or simply difficult to obtain (Clarke & Howard 2006). Between 1977 and 1989 structural adjustment programmes resulted in a contraction of formal employment from 60

per cent to 53 per cent for men, and from 52 per cent to 44 per cent for women (Clarke & Howard 2006).

During the twentieth century Jamaica has experienced significant loss of human capital through the mass emigration of its citizens, particularly the educated and affluent. Post-war immigration to the UK was encouraged for all Commonwealth citizens, but the US restricted entry through strict immigration laws implemented in 1952. However this situation reversed during the 1980s when Britain introduced tighter immigration controls, and US loosened its restrictions. With the impact of structural adjustment and harsh economic conditions in the 1980s, some 200,000 middle class Jamaicans emigrated to North America to find better opportunities and quality of life (Edmonds 2016).

2.2.3 Poverty

Those living in poverty in Jamaica are a complex heterogeneous group; they live in both urban and rural areas. Gray (2004) locates them within five broad strata.

"1. Those who stoutly reject what they regard as the "slave wages" paid to the poor, and who turn to petty hustling, street trading and other self-supporting entrepreneurial pursuits as various as artisanry, street vending and popular singing.

2. Those who fall into the ranks of the militant lumpenproletariat and who turn to crime and predation, drug-dealing and social banditry.

3. Those who attach themselves to the political apparatus to become its fanatical supporters, militia members, "political badmen", constituency enforcers and nibbling supplicants of the state's largesse.

4. The broad strata of the striving, working poor who see themselves as representing the law-abiding "respectable poor", with aspirations of upward mobility and ambitions for self- and community- recovery.

5. The contingent within the lowest rungs of the working poor who retain a tenuous attachment to the wage nexus. Within this contingent are barmaids, menial workers

in the service sector, those hiring themselves out as domestics, gardeners, casual labourers and others working in myriad jobs for which it was necessary to pass a law establishing a national minimum wage." (Gray 2004, p. 14)

Urban squatter communities are the extreme face of poverty in Jamaica. Just under five per cent of households in Kingston are in fact located in squatter communities (Clarke & Howard 2006). Squatter communities lack public facilities and amenities such as schools, clinics or children's playgrounds. Dwellings are constructed from recycled materials, simply built where there is space, with no planning for roads or environmental hazards such as flooding or fire. Those residing in these communities risk ill health from water and airborne diseases, miasma from sewage and uncollected rubbish and pest infestation. Single mothers face the unenviable dilemma of choosing between finding work or starvation, and in seeking employment they are forced to leave their children unattended who are then at risk of injury or death. Squatter communities are typically located in environmentally vulnerable areas such as swamps and gullies. These unplanned settlements damage the overall environment as residents use firewood and charcoal rather than electricity, leading to deforestation, fire hazards and pollution. Furthermore their untreated sewage and waste contaminates and pollutes ground water and rivers (Tindigarukayo 2014).

Whereas those facing poverty in rural communities, subsistence is possible as one may be able to grow one's own food. The land which their property is on, maybe family land that was captured generations ago and while 93 per cent of households in Jamaica have access to electricity for lighting, 36 per cent of rural households still travel for over 1000m to access drinking water and only half of all poor households had access to piped water in their homes (Planning Institute of Jamaica 2012). As discussed in the previous section, Jamaica has a significant proportion of female headed households, 44 per cent of these households rely heavily on remittances received from abroad, rising to 46 per cent of households located in rural communities (Planning Institute of Jamaica 2012).

In Jamaica public education is not entirely free. Parents and guardians are expected to pay a registration fee which covers uniforms, books and other expenses that are not met by the government. Public schools offer a School Feeding and Cooked Meals Programmes which provide subsidised nutritious meals. These essential programs enjoy a high participation rate, particularly with students at the early childhood level (95 per cent). Female headed-households tend to spend more on education with food and transport being the two largest expenses (Planning Institute of Jamaica 2012).

2.2.4   Social Exclusion

Those previously described by Gray (2004) in the last section as the hustlers, the lumpenproletariat, the political supporters, the law-abiding, respectable poor, and the working poor experience social exclusion and marginalisation in a variety of ways according to Bailey (2010). The working poor who are employed in middle class homes see the conspicuous consumerism of their employers, but are excluded from participating in the same consumption (Bailey 2010). For others exclusion comes in the form of the discrimination faced by those residing in squatter and garrison communities. These areas are geographically excluded and often physically, as well as metaphorically, sealed off, with mainstream society avoiding the area. Consequently an entire community becomes stigmatised, whether through not being able to attain employment because of their address or not being able to access public transport or taxis, which refuse to service their areas (Bailey 2010). Impoverished families with school aged children, who are unable to afford school registration fees, find their children are excluded from school and also miss out on the subsidised meals programs. As a result, low educational attainment and poor nutrition continues the cycle of poverty and exclusion.

As will be discussed further in section 2.3.3, party politics plays a central role in the lives of Jamaica's underclass and permeates all of society. Clientelistic politics and patronage can lead to exclusion for those who do not live in the right constituency. For example, access to micro-lending from microfinance institutions is described in a study by Hossein (2016).

Micro finance institutions are politicised and as a result borrowers living in one constituency cannot borrow from an institution located in an opposition constituency. For those who do not want politicised loans, they are faced with voluntary self-exclusion by opting out of microfinance for which they are eligible.

Regardless of social class, people with disabilities who make up an estimated six per cent of the population, (approximately 160,000 people, according to the 2001 census) still face significant structural exclusion (Gayle & Palmer 2005; Tucker 2007). This is particularly so, in the areas of education and employment; some 82 per cent of disabled women and 73 per cent of disabled men are unemployed, and those that do have work are in unfulfilling, low-paid, low-skilled and menial jobs (Gayle & Palmer 2005). Furthermore, Jamaica's built environment and public transport system is not designed to support the requirements of people with disabilities. Thus doorways are too narrow for wheelchairs, there are limited pedestrian traffic lights and almost none with auditory signals, roads and pavements are often broken, uneven with pot holes, many public spaces do not have ramps or adequate lighting. The lack of considered design and urban planning for those with impaired mobility adds to the sense of exclusion of those living with a disability, who can find it difficult to participate in daily life.

2.2.5 Welfare

At present four types of social security programs are administered by the Ministry of Labour and Social Security. Three are social insurance based schemes, which are funded through employee earnings and employer contributions: Old Age, Disability and Survivors' Pensions; Sickness and Maternity Benefits; and Work Injury Benefits. The fourth is a family allowance for vulnerable and disadvantaged people on low incomes and their dependent children. Created in 2001 from an amalgamation of over 40 welfare and safety net schemes (Blake & Gibbison 2015) the Programme of Advancement through Health and Education or PATH, is a conditional cash transfer, social assistance, means-tested

programme, which is funded in part by the government and through a loan from the World Bank.

Its key objectives are to alleviate poverty, increase educational attainment, improve health, reduce child labour and curtail intergenerational poverty. All beneficiaries must make regular visits to health clinics where they can receive free healthcare, and those with school-aged dependants must ensure their children maintain an 85 per cent school attendance rate. They also receive exemptions from secondary school fees and children receive free school lunches. Eligible beneficiaries include children from birth to completion of secondary school, poor, pregnant or lactating mothers, adults aged over 60 not in receipt of a pension, the disabled and poor adults aged 18-59.

Depending on the age of the child, beneficiaries receive from J$750 (AU$7.80) to J$1,150 (AU$11.98) per child each month, while adults receive $J900 (AU$9.37) per month. If beneficiaries fail to meet the required attendance rates then a minimum grant of J$400 (AU$4.16) is paid. By 2005 some 180,000 beneficiaries had received support (Ayala 2006) and in 2011 this increased to over 390,000 registered beneficiaries (Blake & Gibbison 2015).

Specific concessions for the disabled, such as income tax exemptions and housing allocations, are limited to those in employment, and reduced bus fares are only available for residents of Kingston, St Andrew and St Catherine (Tucker 2007).

2.3   Governance

According to the Freedom House measure, in 2015 Jamaica scored two on political rights, three on civil liberties and two point five on freedom rating[1], reflecting Jamaica's relative freedom and stability as a democratic nation (Elliott & Palmer 2008). It is a member of the Commonwealth Caribbean and of CARICOM, the Caribbean Community trading bloc and economic union. Jamaica is divided into 14 parishes ranging in area from 22 to 1,213 km^2

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[1] Countries are ranked between 1 and 7 and scored on their civil liberties and political rights; a score of 1 signifies broad political rights and freedom whereas 7 signifies minimal rights and civil liberties.

with populations of 67,000 to 555,000 (Ayala 2006). Following colonial rule Jamaica has a Westminster parliamentary system, a bicameral parliament with a two-party democracy – the People's National Party and the Jamaica Labour Party. The House of Representatives has 63 members who are elected for five years, and the Senate has 13 senators appointed on the advice of the prime minister and eight on the advice of the opposition leader. Between 1960 and 2016 there were 12 elections with nine different prime ministers and one premier. Although Portia Simpson-Miller became the country's first female prime minister in 2006 and was subsequently re-elected in 2011, women are significantly underrepresented in politics, with just 16 women (21 per cent) sitting in parliament.

2.3.1 Pre Independence

Following the Treaty of Madrid, England gained formal possession of Jamaica from the Spanish in 1670. The Stuart monarchy appointed a civil governor to control the island, acting on the advice of a nominated legislative council. The council comprised the governor and an elected House of Assembly dominated by the planter oligarchy. This model was to continue into the twentieth century. The emancipation of the slaves in 1834 resulted in the loss of free labour. This, along with the passing of the Sugar Duties Act in Britain and the Morant Bay rebellion in 1865 was a major cause of concern for the ruling class. As a consequence the House of Assembly voted to abolish itself and requested direct British rule. In 1866 a new crown colony government was created, consisting of a Legislative Council and an executive Privy Council containing members of both chambers of the House of Assembly. The Colonial Office exercised effective power through a presiding British governor. In the late nineteenth century, crown colony rule was modified; representation and limited self-rule were reintroduced gradually into Jamaica after 1884. The colony's legal structure was reformed along the lines of English common law and county courts, and a constabulary force was established. The smooth working of the crown colony system was dependent on a good understanding and an identity of interests between the governing officials, who were British, and most of the non-official, nominated

members of the Legislative Council, who were Jamaicans. The elected members of this body were in a permanent minority and without any influence or administrative power. The unstated alliance – based on shared ethnicity, attitudes, and interest – between the British officials and the Jamaican upper class was reinforced in London, where the West India Committee lobbied for Jamaican interests. Jamaica's white or near-white propertied class continued to hold the dominant position in every respect; the vast majority of the black population remained poor and disenfranchised.

The plantation model, through law, social codes and labour practices, enshrined inequality of opportunity, wealth, property, education and suffrage (Elliott & Palmer 2008; Greenwell & Hough 2008). After emancipation, estates were abandoned and the newly freed slaves were deprived of paid work from their former masters. Furthermore, planters would only sell estates intact, rather than subdividing them into smaller lots, thereby ensuring that the purchase of land was out of reach for the newly emancipated slaves. In response to this, during the 1830s and 1840s the Baptist church and Quakers who had driven the abolitionist movement in the UK, purchased land and established more than 70 free villages. Free villages were an act of resistance against the oppressive practices of the planters and authorities who colluded to control the emancipated by limiting their access to accommodation tied to their labour on estates. Planters could evict workers at any time without notice, and charged rent for each family member aged over 10, which was deducted from wages. Evictees returning to their accommodation could be prosecuted under the Trespass Act. The masses who were unable to be housed in a free village, either had to squat illegally on land or migrate to urban areas for employment (Tindigarukayo 2014). Land acquired by capture is still passed with no legal title inter-generationally as "family" land while the best quality lands are controlled by a few large farms producing for export markets. These legacies still persist, manifested through the perception that imported goods are better quality than domestic products, and through the rejection of agricultural work, which is perceived as subservient, thus generating a continual rural-urban migration (Elliott & Palmer 2008).

2.3.2 Early Twentieth Century

One of Jamaica's first political parties was the People's Political Party founded by Marcus Garvey, a trade unionist and pan Africanist activist, in 1929. Promoting repatriation to Africa and agitating for human rights for black people worldwide, Garvey was targeted by the US Government as a *persona non grata*. The FBI successfully prosecuted him for mail fraud, resulting in his incarceration for five years in America. Although he died in poverty in England in 1940, his philosophies would go on to influence the Rastafarian movement which was established during the 1930s following the coronation of King Haile Selassie I of Ethiopia.

The Great Depression and ensuing economic instability resulted in considerable social unrest and culminated in the labour riots of 1938. This turmoil created two new political forces, the People's National Party (PNP) led by Norman Manley and a trade union movement under the control of Alexander Bustamante. Bustamante and Manley, distant cousins were both light-skinned, affluent and educated, identified with the common man and were against colonial rule. But by 1943 the authoritarian Bustamante broke away from the PNP to form his own party, the Jamaica Labour Party (JLP) designating himself 'President for Life' (Huber & Stephens 1992). In response to the nationalist movement the British government introduced self-governance, to foster a move towards independence. The JLP won the first two elections in 1944 and 1949; the PNP, by expanding its trade union base, won the next two elections.

2.3.3 Post-independence

On 6 August 1962 Jamaica was granted independence with the JLP incumbent in government. Although its origins are within the labour movement the JLP is in fact a conservative party, while the PNP is a social democratic political party. However a central feature of both parties is their use of clientelistic politics and patronage to sustain loyalty and marshal support (Huber & Stephens 1992). The roots of this can be traced back to

Bustamante in the 1940s and his role as Minister of Communications which enabled him to control the distribution of public works contracts (Edmonds 2016) through his links to the crime gang the 'Rude Boys'.

 Ensconced in power, the JLP used housing to enforce their political dominance. A slum area in Kingston known as 'Back O' Wall', whose residents were PNP supporters, was bulldozed and a new housing project known as Tivoli Gardens was constructed for JLP supporters, thus creating and instituting the garrison community model. Once in power the PNP followed suit and created their own garrisons, Trenchtown and Arnett Gardens. This approach satisfied the short term needs of the underclass and ensured a suppression of radicalism and maintenance of the status quo. Today there are 20 such garrison communities and no political will to demolish them (Edmonds 2016).

In 1972 Michael Manley, leader of the PNP and friend of Fidel Castro, was elected into power on a platform of third path democratic socialism. His government introduced rent and price controls, minimum wage policies, literacy initiatives and maternity and health programmes, repurchased privatised assets and assiduously monitored foreign-owned companies. American concerns about his close ties to communist Cuba, meant that Manley's government experienced constant undermining by the CIA through opposition leader and right-wing reactionary Edward Seaga. JLP's Seaga had influential friends in Washington through his former position as Jamaica's Governor to the IMF and was linked to the criminal underworld through the Phoenix Gang, an antecedent of the Shower Posse which will be discussed in section 2.5. The CIA, in collaboration with the bauxite companies, brought weapons and money into Jamaica to usurp Manley (Edmonds 2016). Seaga, a Reagan stalwart and ally, won the 1980 election, supported the US invasion of Grenada in 1983 and severed all relations with Cuba. The Americans convinced the Seaga government that a free enterprise model would set Jamaica on the road to prosperity. However, that proved erroneous as evinced by the trade deficit tripling by 1982, and in 1985 inflation stood at 30 per cent. At the 1989 elections Seaga was defeated at the polls and a reformed Manley returned to office, seeking assistance from the IMF and complying

with their austerity measures, including the sale of public assets. His party would govern until 2007. The JLP then returned to leadership from the political wilderness, but their term was mired in scandal over their relationship with criminal Don, Christopher 'Dudus' Coke, which led to the demise of Prime Minister Bruce Golding and restored the PNP to power in a landslide victory in 2011. At age 44, the current incumbent elected in 2016, Andrew Holness (JLP), is Jamaica's youngest ever prime minister, the first to be born post-independence.

2.4   Social & Cultural Issues

Wilkinson defines race as a social construct, a group of people "related by common heredity or ancestry and/or who are perceived and responded to in terms of external features or traits" (Greenwell & Hough 2008, p. 191). Within this framework ninety-five per cent of Jamaicans are of African descent, but due to centuries of miscegenation, it is commonplace within most families to see a variety of skin tones and complexions from white to black. During the slavery period, skin colour was graded and used to define the status of citizens by the white British masters. There were seven grades, as outlined in Figure 2; the closer a citizen was to white the more financial and legal privileges were available.

Figure 2: Grades of skin colour
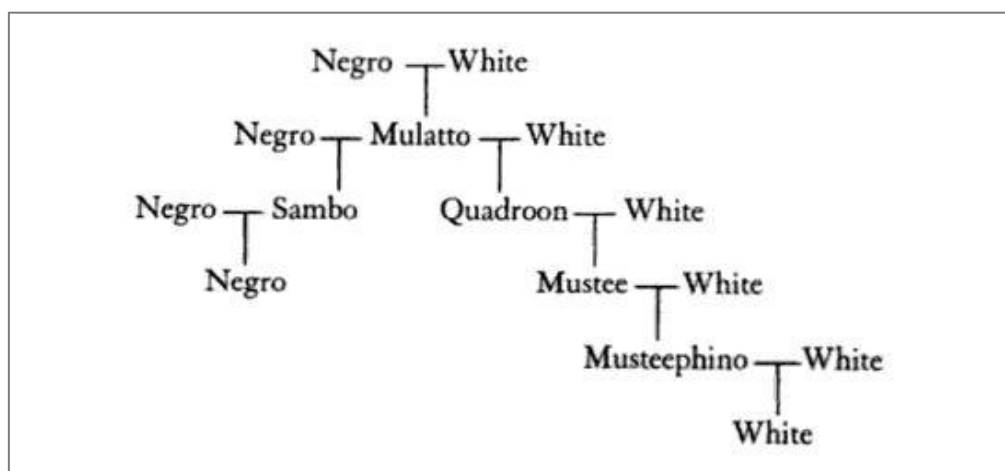
Source: (Higman 1995)

While the words 'negro', 'mulatto', 'sambo', 'quadroon' and mustee' are no longer in use, they have been replaced with contemporary words such as 'bright', and 'browning' to describe someone with a fair or light complexion' while 'darkie' or 'black', refers to a person with very dark or black skin. These terms are not seen as pejoratives but simply descriptors. However, skin colour stratification still sits within a spectrum of privilege, with darker skinned people experiencing more discrimination than their lighter skinned cousins.

Although English is the official language and taught in schools, Jamaican patois, an English-based creole, is spoken by the majority and learnt in the home. It borrows words from West African languages such as Twi, Akan and Igbo as well as Spanish, Portuguese, Hindi, Arawak, Scottish and Irish dialects. Outside Jamaica, members of the diaspora still speak patois. In this study most participants spoke to the researcher in patois.

The dominant religion is Christianity, introduced by the Europeans to eradicate African beliefs. African beliefs such as Obeah, which was banned by the British in 1760 and linked to slave rebellions, ancestor spirits and 'duppies' or ghosts still persist and are often intertwined with Christianity. Rastafarianism, a socio-religious movement, emerged in the 1930s amongst the urban poor, fostering resistance to the system or 'Babylon'. Its principal beliefs are anti-colonialism, wearing hair in dreadlocks, a vegan diet, pride in African heritage and adulation of Haile Selassie I. Rastafarian philosophy is spread through reggae music, popularised by artists such as Bob Marley (Kamimoto 2015).

2.5   Crime Gangs

As previously discussed in section 2.3.3, turf politics, largesse and clientelism are critical to Jamaican political parties in their strategy to secure votes. The link between crime and politics cannot be overstated. In the 1940s three gangs dominated, but now there are over 260 active gangs concentrated around the urban poor, predominantly in West Kingston, where Jamaica's most marginalised reside. Nearly eight per cent live below the poverty

line, both perpetrators and victims of crime, are most often young men aged 16 to 25 years (Leslie 2010).

The political use of criminal gangs and the institutionalisation of the garrison community model has afforded these groups unprecedented power. Gangs commit 80 per cent of all major crimes and are, in essence, sophisticated paramilitary organisations. The leaders of these gangs, each affiliated with a garrison community, are the Dons, both father figure and community leader, as well as judge, jury and executioner. Dons and their criminal enterprises are often legitimately registered as formal business entities in construction and security and operate within the formal and informal sectors. The revenues they generate support their criminal and community activities. The principal objective of the Don is to control citizens and obtain their loyalty. This is typically solicited through their social intervention and community service programmes such as youth clubs, support for elderly residents, financial and moral support for creative activities such as dances, family support for incarcerated prisoners, paying school fees for children and supporting urban agriculture projects (Williams, Densil A & K'nife 2012). Undeniably, the Dons and their gangs operate in garrison communities where the state does not, through the provision of such social support (Leslie 2010). The austerity measures experienced under structural adjustment and the subsequent reduction in education, healthcare and social services not only led to the demise of the state's authority but crucially served to increase the power and influence of the Dons (Edmonds 2016).

In the 1970s the use of criminal gangs escalated. Seaga, as opposition leader, armed his gangs using weapons and money secured from the CIA and bauxite companies in an attempt to destabilise the government. By the late 1970s JLP Don, Clyde Massop, leader of the Phoenix Gang and political enforcer for Seaga, realising that only the politicians were benefitting from the violence, offered a truce with PNP Dons. But with many powerful forces unwilling to see any change to the political status quo, all the Dons involved in the truce were executed, including Massop, who was shot over fifty times by the police at a traffic stop. Other Dons fled to the UK, USA and Canada with the assistance of their

political masters and elites, thus establishing a framework for an international crime syndicate. In fact more than 75 per cent of the guns used in crimes in Jamaica can be traced to three US counties in Florida which are part of the Jamaican diaspora (Leslie 2010). Lester Coke, who had organised the hit on Massop, remained in Jamaica and filled the void left by his death to take over as Don for the JLP. From out of the Phoenix Gang, Coke founded the notorious Shower Posse gang, which ruled Tivoli Gardens and controlled an international narcotics and arms network. The lucrative income earned from South American drugs significantly overtook proceeds from political patronage. After Manley announced an election in February 1980, by polling day in October some 800 people had been killed in a frenzy of politically fuelled violence. This was a watershed moment for violent crime as high levels of violence and murder have now become an enduring characteristic of Jamaican society (Edmonds 2016).

In 1989 Seaga was voted from office. Coke, whose gang created crack cocaine and flooded the American east coast using his networks in the diaspora, lost his political protector and was sought by the American authorities for drug and arms trafficking. While awaiting extradition to the United States where he planned to testify and expose his world of drugs, politics and arms, Coke was killed in a fire in a Jamaican prison cell by persons unknown (Edmonds 2016).

His son, Christopher 'Dudus' Coke, inherited the leadership and ruled Tivoli Gardens for nearly two decades. Referred to as 'President' and ruling with an iron fist, he demanded that even the police needed his permission to enter his fiefdom. He enforced discipline through his own prison and justice system and was seen by residents as a 'Robin Hood' figure as he facilitated vital social services and medical care.

In 2009 the US requested extradition of Dudus for narcotics and arms trafficking. Initially, JLP Prime Minister Bruce Golding's government rejected the extradition request, even seeking advice from an American law firm. Finally bowing under pressure from the public and the opposition, the prime minister acquiesced after nine months. The security forces

prepared to attack Tivoli Gardens and to remove Dudus by force. However the community barricaded themselves in and refused to board evacuation buses sent in by the police. Residents, including many women dressed in white,[2] protested, holding signs proclaiming 'After God, Dudus comes next' and 'Jesus died for us, we will die for Dudus'. A state of emergency was declared and an attack mounted. After four days of intense fighting, 500 people were arrested and more than 70 were killed. Coke was not found but was captured a month later at a roadblock. He requested immediate asylum in the US Embassy rather than incarceration in a Jamaican prison cell, fearing the same fate as his late father. He was extradited to the US where he was tried and sentenced for 23 years. Coke remained tight lipped throughout and betrayed no-one (Edmonds 2016).

Today Jamaica has one of the highest murder rates in the world (62 per 100,000 people.) Since 2000 an estimated 13,000 people have been murdered (Leslie 2010). The structural inequalities faced by the disadvantaged and urban poor lead to violence and anger as they watch the "conspicuous consumption by urban elites" (Tindigarukayo 2014, p. 38). In fact the wealthiest 10 per cent are responsible for more than 30 per cent of national consumption while the poorest 10 per cent enjoy just 2.5 per cent. In a country where most children have their birth mother in their home but only 40 per cent have their birth father present (Planning Institute of Jamaica 2012), Tindigarukayo (2014) argues that high levels of street children and single parent families are a reflection of the lack of parental supervision and male role models in the household. "Violence in Jamaica is everybody's business" (Tindigarukayo 2014, p. 40) and impacts the whole of society. Business is conducted at high risk of theft, injuries and the loss of human and social capital. Every year thousands of citizens, potential employees and entrepreneurs, migrate at a faster rate than those that return, while there is high public spending on policing and violence-related health matters, which redirects funding from other areas.

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[2] Wearing white symbolises religious devotion and dedication.

2.6   Chapter Summary

This chapter has considered the core structural factors that may have had an influence on this study. These include complex and conflicted economic, social and political environment faced by those living in Jamaica. The chapter first provided a historical background of conquest, colonisation and enslavement, before moving onto its slow moving economy, key industries and its financial enslavement to global multilateral entities through debt. It then investigated the experiences of the poor, a complicated heterogeneous group and their experiences of marginalisation, unemployment and limited government support. The chapter then investigated the governance structures implemented during and after colonisation and the centrality of clientelistic politics and patronage with its link to the garrison community model and criminality that suppresses radicalism and maintenance of the status quo. The history of skin colour stratification, language and religion were also discussed before the chapter analysed crime gangs and the role of the Dons, violence and politics. The next chapter examines the literature on social enterprises and the economic context in which they reside. It also considers the importance of local policy frameworks, decision making structures and socio-cultural context (Barraket et al. 2010) on the characteristics of social enterprises as these may vary depending on the audience, participants, time and context (Teasdale 2011).

CHAPTER 3 SOCIAL ENTERPRISES

The previous chapter provided the social, economic and historical context for the study which is located in Jamaica. This chapter examines social enterprises commencing with an analysis of the economic context within which they reside, followed by a review of the literature on social enterprises, and an exploration of the fundamental differences between social enterprises, not-for-profits and commercial businesses. The chapter then examines two decision making structures that have been specifically established using the vehicle of social enterprise to alleviate poverty and create economic outcomes, namely microfinance microenterprises (individual decision making) and work integration social enterprises (collective decision making). The chapter discusses the literature on social enterprise corporate governance and accountability and is followed by a study of the role of two key stakeholders – board members and participant workers.

3.1 Economic Context

Over the last three decades, neoliberalism has dominated global economic and government policy. According to its exponents, it enables market forces to function without hindrance, taxation or regulation, allows economies to grow faster, provides employment, and creates a better standard of living (Griffith 2010; Jurik 2006). Central to neoliberalism are the concepts of the individual, personal responsibility, self-care, entrepreneurial culture, rationality, private property rights, free markets, free trade and efficiency as an antidote to a culture of dependence and collective self-help (Garrow & Hasenfeld 2014; Teasdale 2011; Truong 2006) epitomised by British Prime Minister Margaret Thatcher's declaration that "there is no such thing as society[3]" (Fotaki & Prasad 2015, p. 564). Thus "the meaning of freedom becomes dominated by market freedom" (Truong 2006, p. 1265) and "neoliberalism defines wellbeing as utility maximisation" (Fukuda-Parr 2003, p. 304),

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[3] The full quote reads: "And, you know, there is no such thing as society. There are individual men and women, and there are families. And no government can do anything except through people, and people must look to themselves first".

that is happiness and security through the supply of services and commodities, rather than human capabilities.

Neoliberalism rejects government intervention and collectivism, viewing civil society and government as useless, inefficient and onerous (Dart 2004; Fukuda-Parr 2011). It seeks to remove or reduce the role of government through devolution and privatisation of state services, shifting responsibility to the market, to make them more responsive, competitive and efficient (Garrow & Hasenfeld 2014). As a consequence, neoliberalism has triggered a significant reduction in state provided services (Lund 2002), as well as the imposition of structural adjustments packages, privatisation of state assets and the decimation of the welfare state (Kerlin 2013). Therefore, as government funded services for the most vulnerable have declined, there has been a surge of market based initiatives driven by non-profit organisations, voluntary associations as well as individuals to solve major social issues (Alvarez, Barney & Newman 2015; Borzaga & Defourny 2001) such as poverty, homelessness and unemployment. Known as social enterprises these types of ventures typically use commercial activities to address social problems (Kerlin 2013) or to create social value. In fact European discourse speaks of the failure of the market to meet the demands of all its citizens leading to an increase in market based social solutions (Teasdale 2011). These initiatives use a variety of strategies to engage those facing disadvantage such as creating access to credit or asset building instruments (Cooney & Williams Shanks 2010) establishing property rights, social entrepreneurship, base of the pyramid initiatives (Alvarez, Barney & Newman 2015), and removing barriers to employment through work integrated social enterprises (Barraket and Archer 2010; Pearson and Helmes 2013).

Although it is hard to define or evaluate the scale and scope of these initiatives (Peattie & Morley 2008), governments around the world have encouraged their growth through funding initiatives such as the United Kingdom's Big Society Capital Bank, United States Agency for International Development's funding program in Jamaica and Australia's Social Enterprise Innovation and Development Fund (Australian Government 2013; Cabinet

Office 2011; Jamaica National Building Society 2014). With the influence of rational,

market based thinking, income generation, and the language of business (Dart 2004)

social enterprises, as Blackburn and Ram (2006) argue, can be seen as a neoliberal

response to state (Teasdale 2011) and market failure (Thomas, A 2004). Garrow and

Hasenfeld (2014) go further and assert that work integration social enterprises are in fact

"neoliberal organisations par excellence, because their attributes institutionalise and

express neoliberal welfare logic" (Garrow & Hasenfeld 2014, p. 1479). That is to say that

philanthropy is not a sustainable solution as it does not generate capital, whereas under a

neoliberalist ideology, the market can create an economically, sustainable solution to

poverty alleviation (London 2008). A deeper examination of work integration social

enterprises will follow in section 3.3.2.

3.2 Social Enterprises
3.2.1 Social Enterprises, Not-for-Profits and Commercial Entities

Dees (1998) proposes that social enterprises are in fact organisational hybrids, because

they fuse characteristics from both the not-for-profit sector and commercial organisations.

Consequetly, it is important to distinguish between social enterprises, not-for-profit and

commercial organisations (see figure 3). Typically a purely philanthropic organisation, i.e. a

not-for-profit has a cultural, sociological or ideological founding principle rather than an

economic motivation to explain its purpose (Dart 2004). In other words a market based

goal would focus solely on prudential aspects of human behaviour such as prudence, risk

aversion and cautiousness and ignore other virtues such as love, hope and faith

(McCloskey 2006). According to Dees (1998) its beneficiaries pay nothing to receive its

services, it is financially reliant on grants and donations, it may have a volunteer work force

and can expect to receive some of its supplies as in-kind donations from suppliers.

Figure 3: The Social Enterprise Spectrum

THE SOCIAL ENTERPRISE SPECTRUM

		Purely Philanthropic ⟵⟶		Purely Commercial
Motives, Methods, and Goals		Appeal to goodwill Mission driven Social value	Mixed motives Mission and market driven Social and economic value	Appeal to self-interest Market driven Economic value
Key Stakeholders	Beneficiaries	Pay nothing	Subsidized rates, or mix of full payers and those who pay nothing	Market-rate prices
	Capital	Donations and grants	Below-market capital, or mix of donations and market-rate capital	Market-rate capital
	Workforces	Volunteers	Below-market wages, or mix of volunteers and fully paid staff	Market-rate compensation
	Suppliers	Make in-kind donations	Special discounts, or mix of in-kind and full-price donations	Market-rate prices

(Source: Dees 1998, p. 60)

As such purely not-for-profits are rooted in a social justice or human potential framework with a discourse in engagement, participation, empowerment and social transformation (Gidley, JM et al. 2010). Whereas social enterprises, as underscored by Dees (1998), appear to have mixed motivations. They have both a social mission like a philanthropic agency and also a drive to make profits like a commercial entity. Their beneficiaries may be an amalgam of paying customers to those who receive subsidised rates or even receive goods and services for free. As a hybrid they are able to access both philanthropic grants as well as capital that may be discounted or below market rates. Hence, social enterprises exploit philanthropic goodwill in order to secure low cost resources such as volunteers and discounted supplies, whilst being market driven and motivated by their own self-interest. On the other hand, purely commercial businesses have an economic mission and are totally market driven and receive no philanthropic goodwill. They pay market rates for their labour and supplies, which in return their beneficiaries pay market rates to access their goods and services. For that reason, social enterprises and commercial businesses

appear to be located within neoliberalism as their mission is to meet market demands. Nonetheless, there is a subtle distinction then between purely commercial businesses and social enterprises, and that is, the use of profit. In general, social enterprises use their profit to solve a social problem, whereas the profits of commercial entities go to shareholders. Although some social enterprises are cooperatives and their members are able to share in the profits, they usually belong to a marginalised group and receipt of these funds may directly alleviate their economic deprivation.

Unlike not-for-profit organisations which are reliant on public generosity, social enterprises tend not to rely on traditional philanthropy (Madill, Brouard & Hebb 2010). Although they may accept donations, they may also receive government subsidies to provide opportunities to the marginalised (Cooney & Shanks 2010). Many not-for-profit organisations are eligible for a range of tax concessions from their governments, since they provide specific services to their beneficiaries. Social enterprises are often ineligible to receive government entitlements, particularly those that distribute profits back to members.

Commercial entities and not-for-profit organisations generally seek to recruit the most talented and experienced personnel to fulfil their missions. In contrast, social enterprises may intentionally recruit the low or non-skilled, long-term unemployed, those with intellectual or physical disabilities or those who face exclusion from the traditional labour market due to their health, gender, geography, conviction record, ethnicity or age (Peattie & Morley 2008). Furthermore, social enterprises seek to empower excluded groups, by enabling them to participate within the organisation and in the marketplace.

3.2.2   Definition

Historically social enterprises originate from pluralist membership-based entities such as associations, mutual-type organisations and co-operatives that included social goals as part of their charters (Borzaga & Defourny 2001; Ridley-Duff 2007). Kerlin (2009) supports this view arguing that while there has been large growth over the last two decades, the

idea is an old one with simply new terminology. For her the term 'social enterprise' means not-for-profit organisations earning income from commercial activities. In fact, the term has been in widespread use since the late 1980s and early 1990s in the USA and Europe (Teasdale 2010, 2011). Barraket et al. (2010) define social enterprises as entities that have a mission with a community benefit, undertake commercial activities to achieve that mission, and receive a significant share of their income through trade and reinvest surpluses to continue in the fulfilment of their mission. Cornelius and Wallace (2013) cite the British government's definition, which views social enterprises as belonging to the third sector as "a business with primarily social objectives, whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners" (Cornelius & Wallace 2013, p. 232). However, there is a danger on relying on government definitions, because as Kerlin (2013) and Teasdale (2011) assert political discourse can indirectly mould or influence the model of social enterprises. This is evidenced by the shift in the British social enterprise model. Initially they were collectivist co-operatives which featured profit sharing amongst members. But once the concept of social enterprises gained traction with the Labour government's Third Way, (which Garrow and Hasenfeld (2014) argue was hatched from neoliberalism), they became embedded within government policy, leading to the creation of its Social Enterprise Unit. The collectivist model switched to an American style individualistic decision making entity, earning income from public service delivery with asset locks to prevent individuals benefiting from profits (Teasdale 2011).

Despite the lack of a formal definition, the literature offers several common themes, such as social goals or value, social activism, entrepreneurial innovation, using profit to tackle social issues, pursuit of goals for the common good and meeting unmet need through trade (Barraket & Archer 2010; Pearson & Helms 2013; Trivedi & Stokols 2011; Williams, Densil A & K'nife 2012). Hence, in this study, social enterprises are defined as organisations that seek to address social problems, generate income through commercial activities, may be eligible to receive philanthropic or government grants to subsidise their

mission and may deliberately recruit a workforce, which includes personnel, who are excluded from the mainstream labour market.

3.3   Individual and Collective Decision Making Structures

American social enterprises, which take an individualistic and hierarchical structure, are linked with a neoliberal discourse that has seen a contraction of 'inefficient' government support of social services (Cooney & Willams Shanks 2010; Teasdale 2011) and tend to be driven by an individual social entrepreneur. Whereas the European approach, which takes a collectivist and democratic approach towards achieving social goals have been dominated by cooperatives (Teasdale 2011). In assessing the literature on social enterprises Teasdale (2010) recognises that there are a wide variety of organisations that can be viewed as social enterprises. Consequently, it is prudent to investigate the decision making strategies they deploy to meet economic objectives. Barraket and Archer (2010) examine businesses "owned either collectively by a group of citizens or by a third sector auspice" (p.15), whose mission is to fulfil unsatisfied community needs through trade. Seddon, Hazenberg and Denny (2014) outline the Emergence de L'Economie Sociale categories from Europe for social enterprise intervention programmes as "worker co-operatives, community businesses, social firms, intermediate labour market organisations, voluntary organisations and commercial integration organisations" (p. 223). Teasdale (2010) identifies four types of social enterprises based on their primary purpose (economic or social) and decision making structure (individual or collective). These are shown in figure 4.

Figure 4 Forms of Social Enterprise Spectrum
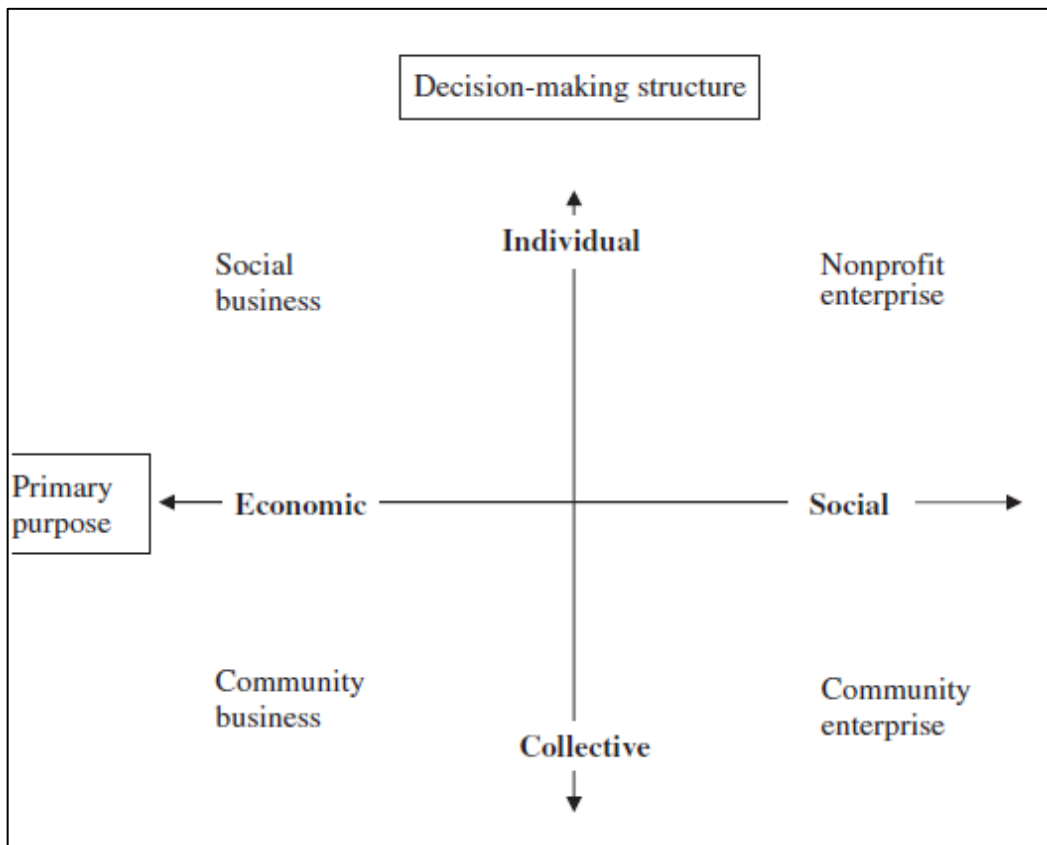
(Source: Teasdale 2010, p. 93)

Thus an entity, which has an individual decision maker and an economic purpose, is a social business, whilst those with a collective decision making body would be a community business. On the other hand, those with a social primary purpose and an individual decision maker are a non-profit enterprise whilst those with collective decision makers are considered a community enterprise. This study is concerned with social enterprises that have an economic purpose. Therefore it is useful to consider social and community businesses as outlined in figure 4, which feature either an individual or collective decision making structure. On examining the literature, microfinance microenterprises appeared as a popular form of social enterprise that features an individual decision making structure, whereas work integration social enterprises which supports beneficiaries to participate in the workforce as employees typically have a collective decision making structure.

3.3.1 Individual Decision Making - Microfinance Microenterprises

Utilising the framework provided by Teasdale (2010) in the previous section, microfinance microenterprises are classified as social businesses. They have individual decision makers, with a primary goal to be economically successful. They can be seen as a neoliberal response to poverty because microfinance provides access to credit and other financial services to some of the world's poorest people, to help them start their own businesses termed microenterprises. Microfinance has been praised as a panacea for poverty (Alvarez, Barney & Newman 2015; Cooney & Shanks 2010). India alone has over 200 microfinance institutions with 44 million borrowers lending US$12.3 billion and saving $1.8billion (Microfinance Information Exchange 2017). It works by providing access to capital to those who are typically excluded from financial services to invest in commercial activities (Alvarez, Barney & Newman 2015; Anderson, Locker & Nugent 2002; Cooney & Shanks 2010). Funds are borrowed in a group to boost repayment, and there are repeated, personal interactions between the banker and borrower, which contribute to the high repayment rate of 95 percent (Cooney & Shanks 2010). Some microfinance banks offer regular group meetings, which provide training and education in business and finance as well as community health such as family planning (Anderson, Locker & Nugent 2002). Access to microfinance can raise people out of poverty and improve their living standards or for some women it provides independence that enables them to leave the house and participate in their community (Alvarez, Barney & Newman 2015; Anderson, Locker & Nugent 2002). Loans tend to be used to fund "small retail operations or dairy farming" and can be seen as a form of "revolving credit" (Alvarez, Barney & Newman 2015, p. 28). Schumpeter declares that entrepreneurship encourages industrial innovation and stimulates economic growth (Bousrih 2013). Terjesen and Amorós (2010) lament that only one-third of the world's entrepreneurs are women, but female entrepreneurship is vital for social and economic progress of developing countries. But, the fact, that participants need to be entrepreneurial with the skills, interest and motivation to exploit opportunities that

access to capital can provide (Alvarez, Barney & Newman 2015) is a critical disadvantage of microfinance as a poverty alleviation strategy. Bruton, Ahlstrom and Si (2015) agree that not everyone can become an entrepreneur and micro loans can in fact, keep people in poverty. Calling this 'subsistence entrepreneurship' they contend that microenterprises are unable to grow beyond the confines of the immediate family, are not scalable and therefore cannot significantly improve participants' lives. Moxham (2005) attests to this in Timor Leste, where he sees examples of 'survivalist enterprises' (Rogerson & Rogerson 1997), microenterprises run by unskilled women that do not create a minimum standard of living and cannot expand beyond one person.

Women living in poverty have often been targeted to participate in microfinance programs to establish their own microenterprises, as women will apportion higher amounts of income to the whole family's wellbeing and can combine parenting with their business management (Jurik 2006). Female run enterprises tend to be home-based with one or two workers. They are more likely to use unpaid labour and to employ other females. Microenterprises enable women to assert influence on family decision making, however home duties and child care can compete with the time needed to invest in the business. On the other hand male run businesses can rely on spousal support, although this is not the case in female run businesses which if successful, Grasmuck and Espinal (2000) found that their husbands or spouses take over their businesses.

Although microfinance does provide "poor families more control over their finances…and manage the uncertainties of being poor" (Roodman 2012, p. 6), critics of microfinance argue that it has no impact on poverty alleviation. Alvarez, Barney and Newman (2015) maintain that it is the ability to save money, which helps improve lives. Those on limited incomes find it difficult to save, but those who participate in asset building schemes become more self-confident and experience hope (Cooney & Shanks 2010). Moreover, Cooney and Shanks (2010) concur, and report that lending to poor women in Bangladesh increased their children's enrolment at school and improved their nutritional intake. The evidence is that, while India and Bangladesh has seen significant activity in the

microfinance space, their economic growth has come from industrialisation, which, in turn, has created poor working conditions and unsafe, polluted environments (Alvarez, Barney & Newman 2015). In the US while microenterprises can increase the probability of self-employment, decrease periods of unemployment, they cannot transition large numbers of people out of poverty (Cooney & Shanks 2010). Jurik (2006) found in her study of American microenterprises that success is characterised by high loan repayments, reduced services for their clients, and only working with those who were most likely to be successful and did not need access to additional (costly) training or resources such as child care. Indeed, the microenterprises deliberately shifted to recruit 'desirable' clients and spouted a discourse of 'hard work' and 'individual responsibility' that failed to recognise the barriers faced by women and those from ethnic minorities (Jurik 2006).

3.3.2 Collective Decision Making Structures - Work Integrated Social Enterprises

According to Teasdale (2010) these entities could be seen as community businesses given that their primary purpose is economic, and they typically have a collective decision making structure. Ho and Chan (2010); Sanchis-Palacio, Campos-Climent and Mohedano-Suanes (2013); Seddon, Hazenberg and Denny (2014); Smith, Gonin and Besharov (2013) identify work integrated social enterprises (WISEs), as those which assist people facing barriers to mainstream employment by providing training and employment opportunities. Their core strategy is to integrate the marginalised, both into the labour market and community. They operate across a range of sectors and compete in the mainstream marketplace, as well in the not-for-profit sector for philanthropic grants (Cooney & Shanks 2010). Sheltered workshops, the co-operative movement, mutual self-help and charitable social work are the genealogical roots of these enterprises (Nyssens 2007). A distinguishing characteristic of WISEs is that they are underpinned by both a neoliberal and human potential ideology. As a result, they view the marginalised as full of potentiality and the interventions offered enable and empower their cohort to engage in labour market activities (Gidron 2014) on their own terms, while simultaneously financially

investing in skills' training to create economic growth for both the individual and society. For example, social co-operatives in Italy provide employment programs, as well as retail goods and services to those experiencing social exclusion. These co-operatives also work to create inclusion opportunities for the excluded to become entrepreneurs, and in this fashion the marginalised are able to transform themselves from passive welfare recipients to being active in their employability (Thomas, A 2004).

In contrast, critics Garrow and Hasenfeld (2014) point out that WISEs symbolise neoliberal welfare logic as they embody neoliberalism's central tenets of individualism, devolution, privatisation, and self-sufficiency. The newly privatised and devolved welfare state shifts the burden of the unemployed to the individual and not-for-profit sector, which is forced to behave like a commercial business, obliged to replace lost subsidies with earned income. WISEs are then subject to a range of contradictory logics and tensions, as they are located within the conflicting fields of the market and social services and are at risk of subordinating their social mission to meet business goals. Thus, the participant worker is both a client of a social service and a productive unit of a business and faces the commodification and exploitation of their labour. Customers using business logic hold WISEs accountable to market standards in terms of service delivery and expect competitive pricing, which may lead to mission drift as the market dominates their operations. Consequently a WISE may choose to work with the least disadvantaged and more 'desirable' clients. Even if successful, WISEs can expect to face stiff competition from the private sector. If they fail, it is seen as a victory for the marketplace, which eliminates weak businesses for poor performance. Finally, Garrow and Hasenfeld (2014) argue that WISEs legitimise the state's need to decrease safety nets for the marginalised and precludes discussion on structural exclusionary practices such as income inequality, discrimination, casualisation of the work force and low paid jobs.

3.4   Forms of Social Enterprises

The early incarnations of present day social enterprise are mutual associations and cooperatives (Borzaga & Defourny 2001), which are still in existence today. Cooperatives are membership-based, pluralistic organisations (Ridley-Duff 2007). In the UK cooperatives are registered as industrial and provident societies (Spear, Cornforth & Aiken 2009), highly regulated and governed by "several bodies of law" (Ridley-Duff 2007, p. 386), which has stymied their growth, compared to European Cooperatives, which have seen strong growth.

Research into social enterprises is still in a developmental stage and is "an emerging field of interest" with British universities publishing the bulk of the research (Granados et al. 2011, p. 203). It is, therefore, not surprising that the governance literature reflects this. There is much commentary on the new British legal form for social enterprises, the Community Interest Company (CIC) (Mason, Kirkbride & Bryde 2007; Spear, Cornforth & Aiken 2009; Yeoh 2012), which was introduced in 2005 under the Companies (Audit, Investigations and Community Enterprise) Act 2004. A CIC is a company that is formed for the benefit of the public good, rather than for private shareholders. As a limited company, it cannot receive any tax benefits as a registered charity; however charities can register a subsidiary as a CIC (Yeoh 2012). Furthermore the regulator must approve that its social mission passes the community benefit test (Reid & Griffith 2006), as well as receive annual statements attesting to stakeholder engagement, its financial management, thus combing accounting disclosure with social outcomes (Yeoh 2012). The CIC legal form provides legitimacy to a social enterprise, as it demonstrates it can comply with the regulatory requirements (Larner & Mason 2011). On the other hand, directors of CICs are accountable only to the regulator with minimal accountability to stakeholders, underpinning the convention "that a dominant group have an automatic right to involvement in governance (entrepreneurs, regulators and funders)" (Ridley-Duff 2007, p. 388). An additional feature of CICs is that they are required to have asset locks to prevent the

distribution of assets or profits to shareholders (Mason 2012; Reid & Griffith 2006; Ridley-Duff 2007). However, this has the potential to not only limit investment returns to lenders and investors (Reid and Griffith 2006), but to discourage investment and as a unitarist model of governance, disempowers stakeholders from receiving the economic value that they have created (Ridley-Duff 2007).

However, the CIC is but one legal form and social enterprises in the UK and around the world can take a variety of legal forms such as companies limited by shares or by guarantee, incorporated associations, industrial and provident societies, sole traders, registered charities and partnerships. Social enterprises, which are mutual associations or co-operatives, are owned by their members, who receive distributions of surpluses and exercise their power through voting rights (Larner & Mason 2011; Mason, Kirkbride & Bryde 2007). A social enterprise can also be owned by an individual or by established not-for-profit institutions, such as churches or charities. In Jamaica some 20 per cent of social enterprises were established by religious, educational or charitable institutions, whereas 29 per cent were unincorporated associations and 27 per cent registered as companies limited by guarantee (K'nife 2013).

3.5   Accountability

The traditional view with regard to commercial entities is that accountability should focus on financial disclosure (Connolly & Kelly 2011). Compared with private firms who answer to shareholders, social enterprises have multiple stakeholders with diverse needs, which can make this challenging (Mason, Kirkbride & Bryde 2007). However accountability is a way of achieving legitimacy from both upward and downward stakeholders demonstrating a social enterprise's probity, efficacy and impact. Financial accountability and disclosure is useful and usually required by the board, for funders and regulators (upward stakeholders), although it is often of little value to downward stakeholders, i.e. beneficiaries and volunteers (Connolly & Kelly 2011).

The intangible nature of a social enterprise's social value can be difficult to articulate. Social impact assessment and social audit tools can evaluate transparency and measure impact (Yeoh 2012). Moreover, there are some 150 tools available to measure social value creation and impact including 'Social Return on Investment', 'Prove and Improve', 'Local Multipler 5' and 'Kaplan and Norton's Balanced Scorecard' (Yeoh 2012). However, there is no single reporting standard to assess social impact (Larner & Mason 2011) or to ensure their accountability to all stakeholders. Nevertheless, there is a considerable danger that isomorphic pressures from upward stakeholders over social accounting methods can jeopardise a social enterprise's culture, particularly when beneficiary needs are embedded in their values which are essential to long-term success (Larner & Mason 2011). But too much attention on financial and statutory obligations shifts focus from social goals, running the risk of mission drift.

Connolly and Kelly (2012) proffer a solution to manage accountability, whilst keeping values intact (figure 5). Their framework outlines three types of accountability legal, constructive and voluntary, to whom they are targeted, upwards or downwards stakeholders, what processes, performance or programmes are needed and the mechanisms that can be utilised. Thus, the fiduicary and legal accountabilities consider contractual compliance required for upwards stakeholders such as donors, funders and regulators to prevent malpractice and misappropriation of funds. This can be achieved through reporting mechanisms, meeting quality standards and regulatory requirements. Constructive accountability reflects moral and market expectations required by downward stakeholders, considers performance standards and best practices, that can be managed through continuous learning, performance assessments, and social return on investment scores. Finally the third, voluntary accountability occurs where the social enterprise proactively seeks to create a favourable impression through self-evaluation, benchmarking and continuous improvement to downward stakeholders such as beneficiaries and the public. Furthermore, Yeoh (2012) suggests a learning based approach, which includes

both hard and soft data, building a culture of learning and feedback that is practical,

involves stakeholders and does not burden management.

Figure.5: Social enterprise organisations – accountability bases and mechanisms

Accountability	Primarily to whom?	Base	Mechanism
Legal	Upwards to donors, funders, regulators and oversight agencies	Processes Probity and legality – the avoidance of malfeasance, the prevention of maladministration and ensuring funds are used properly and powers have not been exceeded	Implementation of appropriate authority structures and command and control procedures, and reporting thereon Includes filing annual report and financial statements, obtaining institutional accreditation, meeting legal and regulatory standards and fulfilling contractual obligations associated with grants and service contracts
Constructive	Downward to beneficiaries, the public and media	Performance Aims to prevent wastage of resources (efficiency) and assess whether performance meets required standards. Implementation of practices arising from shifting societal values or emerging political trends that have not yet been codified in law. This often involves some form of negotiation between the organisation and its environment, often due to external pressures following media criticism or from an internal crisis within the organisation or as a result of the threat of explicit performance standards being imposed externally, so that the organisation is appropriately positioned to apply them	Performance assessment and evaluation reports (e.g. balanced scorecard, benchmarking, social return on investment) Continuous improvement through training and organisational learning Web sites Cooperative networks
Voluntary	Downwards to beneficiaries and the public	Programme Concerned with establishing whether the organisation has met its aims and objectives. The organisation is proactive in identifying and interpreting its own standards of acceptable practice	Monitoring and reputational sanctioning of likeminded organisations, where benchmarking and negotiation are common Continuous improvement through training and organisational learning Web sites Participation and self-evaluation Cooperative networks Self-evaluations and adaptive learning (e.g. social accounts and audits)

(Source: Connolly and Kelly 2011, p. 232)

In a study of 82 social enterprises in Jamaica, Knife, Haughton and Dixon (2014) found

that none would divulge their details of their financial stewardship despite being in receipt

of donations and grants. The reluctance to share information can form a perception that

the organisations are not transparent, unsustainable and perhaps not creating any value

for their beneficiaries. Paradoxically the majority of the social enterprises believed they

created social value while not having adequate access to resources.

3.6   Stakeholders

Generally, social enterprises' have a myriad of stakeholders such as shareholders, founders, government, employees, participant workers, directors, members, volunteers, customers, local communities, funders, investors, suppliers and beneficiaries (Huybrechts 2010; Larner & Mason 2011; Yu 2013). Those involved in social enterprises can often be several types of stakeholder, concurrently serving as volunteers, service users, employees or directors (Huybrechts 2010). Essentially stakeholders can be identified as those who can affect the realisation of the social enterprise's mission (Mason, Kirkbride & Bryde 2007) and from the perspective of institutional theory, stakeholders are those who "have legitimate expectations about how the organisation ought to be behave" (Yeoh 2012 p240). Thus, these stakeholders such as the general public and the media may not have a financial claim on the business, but have an expectation that the social enterprise will behave ethically. Building on the work of Connolly and Kelly (2011) in figure 5, figure 6 outlines the expectations of each stakeholder group. Upwards stakeholders such as funders and government are concerned with legal accountability and probity, while employees, directors and members are concerned that the social enterprise is meeting its legal obligations and is performing well. Suppliers on the other hand may only be concerned with performance of the organisation, whereas customers and beneficiaries consider both how well the social enterprise is performing as well as if it is meeting its aims and objectives. On the other hand, the general community and media are concerned if the organisation is achieving its mission and objectives and is complying with the relevant regulation.

Figure 6: Stakeholders and their expectations of accountability

Social enterprises engage with their stakeholders in different ways such as through technology, which enables greater connection and participation (Larner & Mason 2011), involvement at board level (Mason, Kirkbride & Bryde 2007) and conducting regular appraisals through surveys and face to face focus groups (Laratta, Nakagawa & Sakurai 2011). Unlike a private enterprise, a significant characteristic of the social enterprise is that stakeholders are able to contribute to decision making (Larner & Mason 2011). For those that include its stakeholders at board level, they are able to contribute to decision making and see a positive impact on their organisation's culture (Mason, Kirkbride & Bryde 2007). Enabling participation of beneficiaries in decision making creates better and more sustainable solutions (Ridley-Duff 2007). Given the complex web of a social enterprise's stakeholders, Mason, Kirkbride and Bryde (2007) propose they be prioritised and managed. For example, participants with limited governance experience Larner and Mason (2011) suggest the establishment of advisory groups that represent their interests. This has the advantage of involving stakeholders without encumbering them with governance responsibilities.

Throughout the literature, government appears as a significant stakeholder of social enterprises with direct or non-direct involvement in its operations. Through coercive isomorphism government can impose regulation, and fundamentally have an overarching influence, although they may not be the biggest stakeholder (Mason 2012). For example, in China, social enterprises formed as statutory not-for-profits are subject to close and continuous scrutiny. Two government agencies perform administrative and supervision duties, which include approving their legal status, conducting annual compliance checks and at times sitting on their boards (Yu 2013). Likewise in the UK, social enterprises which are public sector spin offs, may have government stakeholders on their board (Spear, Cornforth & Aiken 2009). Social enterprises that have heavy influence from government often reflect a coercive and bureaucratic approach (Yu 2013). In Jamaica, social enterprises formed as co-operatives or not-for-profits are supervised by the Department of Cooperative and Friendly Societies. This government agency performs administrative and supervision duties which include approving their legal status, and conducting annual compliance checks.

3.6.1   Participant Workers in Social Enterprises

For this study, participant workers are defined as those, who have been excluded from the mainstream labour market due to their health, gender, conviction history, ethnicity or age and are actively employed in meaningful work at a social enterprise. In practice a more commonly used term for those who are specifically recruited to work within a social enterprise because of their exclusion is 'targeted employee'. The term 'participant worker' is novel and is used within this thesis to fit within the theme of empowerment. The term 'targeted employee' can be seen as exclusionary whereas as 'participant worker', suggests that the worker is participating in their own employment and empowerment rather than being a passive recipient of a social enterprise's benefaction.

Participant workers may also be the founders of the enterprise, answering an unmet commercial or social need such as creating employment or training opportunities for the excluded. For participant workers, their employment at a WISE may help to provide financial sustainability, create social inclusion opportunities, promote their human rights, enable civic and political participation, improve their health and more broadly improve their quality of life (Barraket & Archer 2010; Davidson-Hunt, Turner & Giovannini 2012; Gilbert et al. 2013). WISEs seek to enable their participant workers to gain access to training and employment pathways, increase their workforce participation, increase their self-esteem, and reduce substance abuse and welfare dependency (Barraket & Archer 2010; Pearson & Helms 2013). Despite these benefits, there has been limited empirical research on the role of participant workers within social enterprises (Barraket & Archer 2010; Gidron 2014). While Eversole (2013) suggests that the literature is moving towards the investigation of this aspect, Barraket and Archer (2010) point out that the bulk of the literature on the impact on beneficiaries principally focuses on employment outcomes for government funded reports and evaluations. Interestingly in their 2010 study of 365 Australian social enterprises Barraket et al. (2010) found that while providing inclusion opportunities was their main goal, beneficiaries were not necessarily included at governance level or in decision making roles. Giovannini (2012) argues that participants must be at the centre of the solution in order to change and improve lives. In addition participants' unique cultural aspects must be incorporated within the social enterprise. Another risk that was discussed earlier in section 3.3.2, is that participant workers may face commoditisation and be better valued for their labour as production workers rather than as clients in need of social services (Garrow & Hasenfeld 2014).

3.6.2 Board Members of Social Enterprises

Unlike commercial entities, board members of social enterprises are usually volunteers and unpaid for their work. However, they too are responsible for overall strategy, supervision of the executive director, determination of remuneration levels (Larner and

Mason 2011) and importantly they ensure the organisation remains focused on their social mission (Huybrechts 2010). The skill, selection and retention of board members is a major focus within the literature on social enterprise governance. In China board members are recruited for their expertise, the resources they can marshal or the stakeholders they represent, however highly skilled people are in demand and thus difficult to obtain (Yu 2013). This is in contrast to Belgian fair trade social enterprises with parent charities and British cooperatives, whose directors are democratically elected (Cornforth 2004; Huybrechts 2010). However, electing directors from a membership base may produce members who are ill equipped or inexperienced to deal with governance matters (Yeoh 2012). Alternatively, they may represent factions within the membership or be focused on a cause rather than governance, which may create tension between the board member as a representative and as a professional who needs to drive performance (Cornforth 2004). Another concern is that if the organisation is experiencing declining membership, there is a reduction in the recruitment pool of potential directors (Spear, Cornforth and Aiken 2009). Additionally, election of membership leave a social enterprise at risk of take-over (Larner and Mason 2011). Therefore, the secondment of external people onto the board can bring the requisite skills or expertise and providing training to prospective members can help build capacity (Cornforth 2004), because as social enterprises mature their boards may require a more generalised skill set rather than just represent stakeholders (Mason, Kirkbride and Bryde 2007). Nevertheless, boards with entrepreneurial leanings appear to accomplish more goals, are more innovative and proactive than reactive risk aversive boards who take on a trustee role. Less dynamic boards tend towards mimetic isomorphism and copy governance practices and structures from other known institutions, while more enterprising boards use socially constructionist practice to create highly, individual and unique organisational cultures (Diochon 2010).

3.7 Chapter Summary

This chapter investigated the economic ideology of neoliberalism in which social enterprises have evolved from and operate in and that WISEs are an expression of the neoliberal welfare regime (Garrow & Hasenfeld 2014). There was an examination of the literature on social enterprises and the variances between not-for-profit and commercial entities. The chapter then explored the decision making structures of social enterprises with a particular emphasis on the characteristics of micro finance enterprises and WISEs. The chapter continued with an exploration of the legal structures and forms that social enterprises use and how accountability is considered. This thesis then undertook an examination of two key stakeholders, specifically board members and participant workers. This chapter links with the next chapter through the positioning of social enterprises as a response to the effects of global neoliberalism on the reduction in welfare and government services and explores marginalisation through the concepts of social exclusion and social inclusion. The next chapter will also examine quality of work life and introduce the access-participation-empowerment conceptual framework.

CHAPTER 4   SOCIAL EXCLUSION, SOCIAL INCLUSION & QUALITY OF WORK LIFE

In the last chapter the literature on social enterprise was explored, this chapter extends the exploration of literature to investigate the notions of social inclusion and social exclusion. These concepts are central to the research project because individuals participating in social enterprises are usually subject to deprivation, poverty and inequality (Shivarajan & Srinivasan 2013; Wright & Stickley 2013). Whereas social inclusion relates to what social enterprises aim to achieve namely, individual participation, integration and inclusion in society (Martin & Cobigo 2011). As discussed in Chapter 3, social enterprises enable participant workers to participate within a community, provide an income that relieves poverty and financial exclusion, and create a sense of inclusion. Furthermore, when collective decision-making and job accommodations to meet individual needs are common features within particular social enterprises, freedom from exclusion and good quality of work life can both be experienced. Accordingly, this chapter will review the literature relating to quality of work life, which considers both the subjective and objective aspects of working life, such as an employee's experience of work, working conditions and the behaviour of management towards workers (Burchell et al. 2014; Sundaray, Sahoo & Tripathy 2013; Tongo 2015). The chapter will then end with a discussion of this study's conceptual framework, which was developed from the literature and the research question.

4.1   Social Exclusion

Social exclusion and social inclusion are twin concepts that Spandler (2007) argues are not diametrically opposed and require thorough examination. While this study is concerned with participant workers' experiences of social inclusion, it is prudent to investigate both notions, beginning with social exclusion.

4.1.1 Background

The term 'social exclusion' is generally credited to Rene Lenoir, the French Secretary of State for Social Welfare. During the 1970s Lenoir described *les exclus*, or outcasts, as the one in ten who were disengaged from mainstream society due to their ill health, disabilities, anti-social behaviour, geography, poverty or non-participation in politics (Burchardt, Le Grand & Piachaud 1999; Davies 2005; Levitas 2004; Sen 2000; Wright & Stickley 2013). Lenoir maintained that exclusion had occurred as a result of France's rapid post-war urbanisation. His policy response was to re-engage *les exclus* into society via increased public spending and redistribution, and enfranchisement via civil and democratic engagement (Davies 2005). Meanwhile, across the Channel, a British view of social exclusion had emerged through W. G. Runciman's 1966 classic text on relative deprivation, *Relative Deprivation and Social Justice: A Study of Attitudes to Social Inequality in Twentieth-century England,* which acknowledged that all societies were inegalitarian, but also considered the acquiescence of the underprivileged to their experience of inequality (Ditton & Brown 1981). However Peter Townsend's 1979 influential work, *Poverty in the United Kingdom,* argued that poverty was not simply material deprivation, but affected people's ability to participate in society and to meet the responsibilities of their social roles. During the 1980s and 1990s the term 'social exclusion' was used by poverty activists and within critical social policy to highlight "the multidimensional consequences of poverty and the dynamic processes involved" (Levitas 2004, p. 44) and as a result social exclusion and poverty became inextricably linked in the literature. The British Labour government in the 1990s blamed "industrial retrenchment in the 1980s, the catastrophic indifference of (the Conservative) government and the consequent failure of the welfare state" (Wright & Stickley 2013, p. 78) to adequately address the social and economic problems relating to the dismantling of Britain's major industries (Davies 2005).

The debate on social exclusion and its pernicious effects on society gathered momentum and entered policy discourse in the 1990s and beyond. As a consequence, in 1995 the United Nations Educational, Scientific and Cultural Organisation (UNESCO) held a conference on social exclusion and in 1997 the London School of Economics established the Centre for Analysis of Social Exclusion. The European Union approved a policy to eradicate "poverty and social exclusion by 2010" (Fraser 2011, p. 454) and the Inter-American Development Bank developed an action plan to combat social exclusion. The then British Labour government established a Social Exclusion Unit (Fraser 2011) to assist its three million excluded, its role to offer 'joined up' solutions. In effect, it moved away from income redistribution and saw employment as the solution, thus linking welfare benefits to active job hunting (Davies 2005). However, according to Britain's Trade Union Congress "for the first time the majority of people in poverty are in working families, a development strongly associated with low pay, too few working hours and an unprecedented fall in living standards. Those in insecure work are particularly affected." (TUC 2014, p. 6). The casualisation of the work force, along with low paid jobs, undermines the 'employment solution' as an alleviator of poverty and arguably exacerbates inequality and social exclusion.

4.1.2   Definition

There is no single definition of social exclusion that is widely accepted and there have been limited attempts to define or assess its extent (Burchardt, Le Grand & Piachaud 1999). Nevile (2007) implies that social exclusion is a relatively recent phenomenon in development studies; Sen (2000) quite rightly disagrees, citing Aristotle's and Adam Smith's assertions about the freedom to choose participation that is free from shame or deprivation are in fact early references to social exclusion. The literature describes multiple aspects of social exclusion, which include poverty, inequality, denial of recognition, disrespect, social disintegration, rupturing of social bonds, unemployment, and the inability to participate in everyday life or to exercise rights of participation (Fraser 2011; Wright &

Stickley 2013). Sen (2000) places exclusion within capability deprivation, which prevents the individual from living a decent life. Wright and Stickley (2013) see social exclusion as referring to geographic areas, communities or individuals which are unable to exercise their right to participate, or not, in everyday life and, like Fraser (2011) and Barry (1998), view it as a form of social injustice. Barry (1998) deconstructs social exclusion by first defining social isolation as a form of non-participation whereby people choose to voluntarily withdraw. For example, the affluent may choose to exclude themselves from institutions and build barriers to keep undesirables out (Levitas 2004). Barry (1998) goes on to define social exclusion as a subset of non-participation, namely an involuntary non-participation that is beyond the individual's control. Thus, even where individuals or groups may appear to voluntarily withdraw their participation in response to prejudice or intolerance, it is in fact not voluntary. Barry (1998) cautions that social exclusion should be viewed within its contextual setting, to discern whether it is genuinely voluntary or not. Fraser (2011) argues that there are major deficits in the literature, which do not explain what social exclusion means, and observes that it denies the opportunity to participate as a peer, that is, to experience 'participatory parity'.

Dismissed by Levitas (2004) as vague and not identifying the true nature, nor the causes, of social exclusion, the British Labour government's definition describes social exclusion as more than poverty; it is "a shorthand label for what can happen when individuals or areas suffer from a combination of linked problems such as unemployment, poor skills, low incomes, poor housing, high crime environments, bad health and family breakdown" (Levitas 2004, p. 45). However, Burchardt, Le Grand and Piachaud (1999) assert that any definition should be based on participation in activities linked to dimensions of consumption, saving, production, political and social participation. Their definition asserts that "an individual is socially excluded if (a) he or she is geographically resident in a society and (b) he or she does not participate in the normal activities of citizens in that society" (Burchardt, Le Grand & Piachaud 1999, p. 230)

It is interesting to note that the voices of the excluded are not represented in these definitions, which are articulated by the non-excluded. Davies (2005) notes that people at risk of exclusion hesitate to describe themselves that way and Richardson and Le Grand (2002) recognise the role of academics who deny the excluded their own voice through misunderstanding or misrepresenting their experience of exclusion.

In this study the researcher defines social exclusion as a socially unjust, active or passive process which causes disempowerment of individuals or communities, excludes them from living a life that is free from shame, material and social deprivation, and denies them the right to participate as peers in social, consumptive, political and economic activities.

4.1.3 Elements of Social Exclusion

Richardson and Le Grand (2002) suggest that there are four elements that make up social exclusion - multiple deprivation, relativity, agency and dynamics. Burchardt, Le Grand and Piachaud (1999) concur that social exclusion is multi-dimensional and temporal and hence individuals may be excluded on one or more dimensions over a particular period of time. For example, marginalised groups such as homosexuals may be excluded from participating in the spheres of family or personal life, but may be able to participate fully in employment, politics or civil society (Fraser 2011). Furthermore, individuals can voluntarily exclude themselves or be excluded by others, so exclusion becomes an act engaged in by agents (Richardson & Le Grand 2002). For instance, those with disabilities can use self-exclusion as a strategy to avoid taunts, bullying and indifference from the wider community (Hall 2009). Other factors include health, health care, poverty, long-term unemployment, education, qualifications, life events such as relationship breakdowns, geographic location, land reform and access to institutions such as the welfare state, legal aid, credit and public transport, which can all affect people's ability to participate and thus contribute to their exclusion (Barry 1998; Burchardt, Le Grand & Piachaud 1999; Nevile 2007; Sen 2000). Sen (2000) examines the causal chain and suggests that exclusion can be active (from an intentional policy to exclude) or passive (where the exclusion is an unintended

consequence of social policies or process.) Understanding whether exclusion is active or passive allows a deeper examination of the mechanisms and reasons behind a policy decision which can enable an appropriate response, resolution or debate. For example, political and economic structures may act to deny access to the minimal economic resources that are needed for even minor interactions (Fraser 2011); not having enough money passively excludes people from food markets (Sen 2000).

Levitas (2004) and Davies (2005) examine social exclusion through three lenses. The first is through moral underclass discourse, which views the excluded as moral degenerates who have brought on their situation themselves. The second, redistributive discourse, argues that exclusion is the result of the capitalist system, so the excluded are ousted rather than denied access to material resources. The third lens is social integrationist discourse, which seeks to re-engage the excluded through the market. All three theories divide citizens into in-groups and out-groups; members of in-groups experience a commonality that jointly turns to contempt for those outside the in-groups (De Venanzi 2004).

4.1.4   The Effects of Social Exclusion

Richardson and Le Grand (2002) report that social exclusion affects everyone, and Barry (1998) asserts that it can create extensive differentiation in individuals' lives and trigger a loss of motivation, which can lead to diminished family and social relationships, ill health and even death (Sen 2000). Those facing isolation may experience demonization and dehumanisation by politicians. The elements of exclusion are interrelated and interlinked (Richardson & Le Grand 2002), so that limited job opportunities, for example, reduce educational motivation, which in turn generates poor scholastic outcomes. Those without a postal address or telephone cannot apply for a job, or claim welfare benefits (Barry 1998). Being excluded from financial markets reduces an individual's capacity to take up income-earning opportunities (Nevile 2007) and makes it difficult to receive income or credit or make payments. The excluded must turn to money lenders and pawn shops, which charge

higher rates of interest than mainstream banks (Koku 2015). At a macro level, welfare payments for the long-term unemployed are a massive economic burden, which limits national output and production. This, in turn, results in losses in skills and individual abilities, which can lead to ongoing exclusion from the labour market, a loss of freedom to make decisions and an inability to participate in the community. Joblessness causes emotional suffering and low morale, leading to higher rates of suicide within high unemployment groups and loss of self-esteem, especially in young people (Sen 2000).

Social exclusion clashes with equality of opportunity and limits people's ability to participate or engage in politics (Barry 1998), which denies them the chance of having a say (Fraser 2011). Sen (2000) contends that being unable to participate politically is not only a deprivation that diminishes society, but also a denial of civil rights; as a consequence the excluded must then rely on informal networks for support, rather than engaging in local or national political decision-making. Social exclusion can be experienced on an individual level or by large cohorts, such as women facing exclusion from education, property ownership and work opportunities (Sen 2000) or the coloured and black populations living under South Africa's apartheid regime, which excluded them from access to educational, political and occupational positions (Barry 1998). As a result, the concept of social exclusion can overlook the role of institutions and society in contributing to deprivation (Nevile 2007) and the view that the deprivations of the socially excluded can simply be solved by integrating them into the mainstream (Shivarajan & Srinivasan 2013). Wright and Stickley (2013) also subscribe to the view that social exclusion reinforces the status quo and social order by regulating society and its morals and suppressing an examination of the inequalities. Thus, allowing these inequalities to become legitimised facilitates the maintenance of status, privilege and power.

Interestingly, the meritocracy into which the excluded might theoretically be integrated also affects the understanding of the causes of social exclusion. Levitas (2004) declares that social exclusion, when viewed through a cultural and moral lens, has become code for an immoral underclass such as single mothers or potentially criminal young men. Those

groups, who appear to have problematic or socially disruptive behaviour simply need to adopt society's values and attitudes, such as a 'good work ethic', to escape exclusion. As a result, "the emphasis is on opportunities for individuals to escape poverty, not on the abolition of poverty itself" (Levitas 2004, p. 48). Employment is thus presented as the solution to social exclusion, which ignores and diminishes poor working conditions, job insecurity, the value of unpaid work or non-employment (Levitas 2004). In fact, Davies (2005) agrees with Macdonald, Marsh and Byrne (2001, p. 387), who construe job instability and unemployment as in fact mainstream problems common to the working class. Thus employment, in and of itself, will not overcome the structural inequalities that exclude, deprive and marginalise individuals and their communities.

4.2   Social Inclusion

This chapter will now turn to examine the notions of marginalisation and disadvantage through the literature on social inclusion. There is no distinct history or definition of social inclusion (Simplican et al. 2015), although Gidley, JM et al. (2010) suggest that it is located within the work of nineteenth century sociologist and economic historian Max Weber. Whereas Marx described societal groups as 'capitalists' or 'bourgeoisie', 'workers' or 'proletariat' and the 'petit bourgeoisie', Weber used the terms 'status', 'groups' and 'sub classes'. He developed the notion of social closure as an explanation of how members of an in-group establish and maintain their status and social mobility (Macdonald 1985) through the preservation of privilege and by restricting an out-group's access to resources and opportunities. Unlike social exclusion, Spandler (2007) points out that very little attention has been paid to social inclusion. In fact, there is a lack of clarity or agreement between policy makers and researchers over the term's meaning. Social inclusion diverges from other concepts such as social interaction and social networks and may include subjective factors such as belonging and acceptance (Simplican et al. 2015). In addition, the literature links it to equality of access, participation, integration, and the opportunity or choice to participate in all domains of everyday life (Hall 2009; Nash 2002; Rouse &

Jayawarna 2011; Simplican et al. 2015). Indeed integration, inclusion and participation are rights and obligations enshrined within the United Nations Convention on the Rights of Persons with Disabilities (Martin & Cobigo 2011). Simplican et al. (2015) define social inclusion as the interaction between interpersonal relationships and community participation. Inclusion creates the ability for people to fulfil their social roles or obligations such as employment, voting, social participation and involvement in normal activities within mainstream society (Richardson & Le Grand 2002; Wright & Stickley 2013). For Avramidis and Norwich (2002) inclusion implies the accommodation of the needs of the marginalised within the mainstream, which can create a sense of belonging for all within a community. As with social exclusion, social inclusion is largely defined by those with the power to include or exclude and its definition imposed on the marginalised (Rose, Daiches & Potier 2012). Indeed, out-groups such as the working poor are excluded from political processes and decisions that directly affect them, such as the provision of minimum wages.

Hunter and Jordan (2010) question the shift in discourse from social exclusion to inclusion, which involves people being actively included rather than passively left out of the mainstream. For them this brings to the fore cultural pluralism and the need for the mainstream to recognise cultural and social differences. Thus, all citizens should have the freedom to choose activities that others may not wish to choose. Hunter and Jordan (2010) cite Mason Durie (2003), who questions the comparisons between the mainstream and the marginalised which assume that the mainstream is superior, when the marginalised may actually want something better or different. This sentiment is echoed by Spandler (2007), who argues that the mainstream ideal of status-based materialism causes more problems and in effect creates unhappier societies.

Figure 7 Spectrum of Ideologies Underlying Social Inclusion Theory and Policy
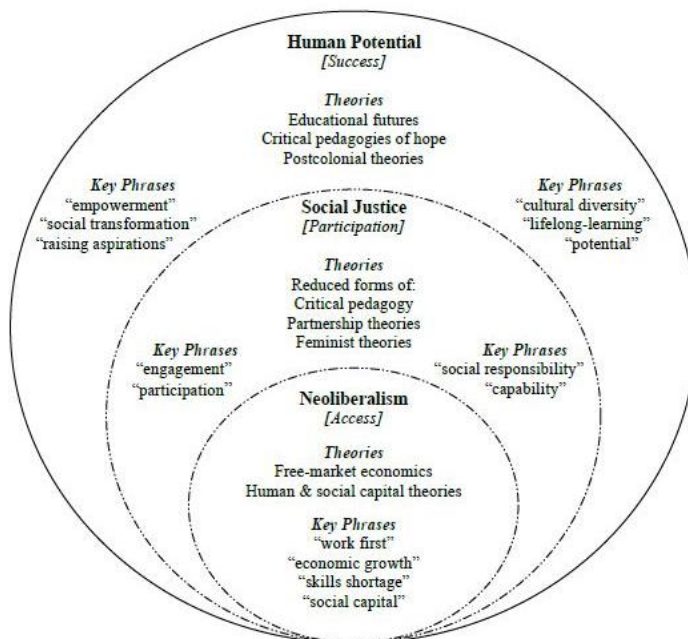
(Source: Gidley JM et al 2010, p. 8)

Gidley, JM et al. (2010) present three ideologies that frame social inclusion, as shown in Figure 7. The first, and narrowest, interpretation is neoliberalism, which views social inclusion as economic equity, and assumes that people are rational decision makers and societies are free from power hierarchies (Gidley, J et al. 2010). It assumes that financial investment in human resources and skills training will enable massive national economic growth, resulting in access to wealth for all. From a neoliberal perspective, a country should open its markets to overseas producers, and weaken employment protections, regardless of the impact on local producers and job security. Gidley, J et al. (2010) assert that neoliberalism is reductionist, and strives for assimilation and homogenisation. Consequently, it reduces social explanations to economic factors. Furthermore, it has a foundation grounded in deficiency and argues the rhetoric of the 'fair go' and social responsibility, which in actuality conceals an economic reality.

The second ideology is social justice, which views social inclusion as participation and engagement for all citizens, based on equal opportunities, dignity, equity and participatory dialogue. Its principal foundation is fairness for all and it seeks to ensure that all can

participate in society, whether or not there is an economic outcome. Contrary to neoliberalism, social justice interpretations of social inclusion encompass multifaceted dimensions of participation that are inclusive of all interests, regardless of power (Gidley, J et al. 2010).

The third interpretation of social inclusion is human potential ideology, which moves beyond models of deficiency and reductionism and sees social inclusion positively framed as potentiality. This perspective focuses on human potential and respects that individuals are complex beings with diverse needs that extend beyond the political economy. Social inclusion, approached through this human potential ideology framework, can be viewed as empowerment (Gidley, JM et al. 2010). Empowerment is a cornerstone of community organisation, adult education, feminist theory, political psychology and the women's movement in the 1970s (Gutiérrez 1990; Stromquist 2014). Although he never used the word 'empowerment' in his work, empowerment theory has been attributed to Paulo Freire and his work on consciousness-raising and empowerment of the disadvantaged through education (Stromquist 2014; Turner & Maschi 2015). Empowerment is multidimensional and goes beyond simply awareness-raising to becoming politically active and challenging the institutional and epistemic structures that hold power and withhold it from the marginalised (Stromquist 2014). Indeed, it seeks to restore people and communities, and to rebuild their value and strength, since the powerless don't simply lack access to power, but are denied access to the requisite resources. Empowerment creates learning and understanding of the inequalities, while focusing on the institutional issues of power that need to change (Gutiérrez 1990). Furthermore, it empowers individuals to find their own answer to their situation and is grounded in a strengths-based approach (Turner & Maschi 2015), focused on an individuals' strengths and positive aspects. Gutiérrez (1990) considers empowerment as a combination of the individual taking action and feeling a sense of personal power and control and, at a macro level, making structural changes to ensure equitable distribution of resources. For her, empowerment theory is a conflict model that views marginalisation as a failure within society to look after all its members

and indicates that changes must happen within society to prevent individual disadvantage. Stromquist (2014) advocates that both public and private spheres of life be analysed to examine how one's private life affects one's participation in public life. The process of creating empowerment includes group work and discussions which develop critical consciousness and enable individuals to motivate and catalyse each other. Gines (2015), citing Collins, sees "black women's relationships with one another" as a safe space, where they can come together as a group to motivate each other, increase their self-efficacy, reduce self-blame and enable the individual to assume personal responsibility for change. This process is neither linear nor consecutive and its many manifestations can occur concurrently (Gutiérrez 1990). As was discussed in the previous chapter, not-for-profit organisations, along with social enterprises, typically have a foundation in social justice and seek social transformation. Consequently empowerment becomes a tool used by those organisations wanting to raise the aspirations and transform the lives of the marginalised.

4.2.1 Factors of Social Inclusion

Broadly Teasdale (2010) argues that for individuals to be considered socially included they need to be engaged in four specific dimensions: ability to purchase goods and services, participation in socially valuable activities, involvement in local or national decision-making and social interaction, and integration with the family, friends and the community. Teerakul et al. (2012) build on and expand these dimensions to encompass household assets, income and consumption expenditure and social deprivation of such basic needs as social participation, economic vulnerability, financial control and happiness. Barry (1998) insists that to experience full participation in society one needs to be financially included, that is to be clothed, have access to public transport or have money for a taxi or a car, and be able to offer hospitality (buy a meal or drink).

According to Gidley, JM et al. (2010) the factors proffered by Teasdale (2010), Teerakul et al. (2012) and Barry (1998) are located within the neoliberal and social justice ideologies

which focus on access and participation. That is, to be included individuals need access to economic equity and to have control of their finances, while being able to participate at a local and community level. In their models of social inclusion, aspirations are not raised, social transformation is not considered and future potentiality is not apparent.

4.2.2   Factors of Social Inclusion for the Disabled

In considering the exclusion faced specifically by people with disabilities, Hall (2009) describes six areas within social life domains that are central for individuals to experience social inclusion: being accepted and recognised as individuals, rather than by their disability, having reciprocal interpersonal relationships, participation in recreational activities, having appropriate living accommodations, being in employment and receiving formal and informal supports. Hall (2009) and Spandler (2007) highlight agency in the creation of inclusion opportunities for the marginalised. Hall (2009) review of 15 studies on social inclusion of people with disabilities, found that 'other people' were the principal sources of a disabled person's experience of inclusion or exclusion. That is, extrinsic factors such as social acceptance from the community can enhance or hinder inclusion and participation opportunities. Typically, support received from family, friends and staff boosts inclusion, while negative attitudes, taunting and physical abuse from others or the inability to access activities, decrease inclusion. High levels of interaction, through interpersonal relationships in multiple contexts, play a critical role in inclusion, whether through family members, friends, acquaintances or colleagues. Participating in social and leisure activities such as attending church or going out to eat, as well as access to meaningful employment, not only enhances the sense of inclusion, but provides a sense of independence, belonging and being recognised as a unique individual.

These factors of social inclusion for those with a disability are principally located within the social justice ideology and heavily focused on participation and engagement. While there is an acknowledgement of economic access, participation and interaction with others are

the dominant themes. That is to say, like the factors discussed in the previous section, empowerment of the disabled is lacking from these models of social inclusion.

4.3   Quality of Work Life (QWL)

4.3.1   Background

Over the last century, society's views on the meaning of human life have changed, from a mere acknowledgement that we have it, to an affirmation that we should do our utmost to enhance its quality through healthcare programs, education and building community resilience (Koot & Wallander 2014). Similarly, there has been an evolution within the sphere of organisational theory, which has moved away from Taylorism and the mechanistic workplace towards concepts of "quality of work life". Thus, simply having a job does not guarantee a good standard of living (Burchell et al. 2014; Singhai & Garg 2014). People search for meaning in their work, as well as in their lives, in order to meet their short and long-term needs (Chitakornkijsil 2010).

Indeed, during the 1960's there was a focus on the relationship between employees and their work environment (Singhai & Garg 2014). Employers, unions and policymakers in Sweden first moved towards humanising work. This trend moved across Europe in a less organised way and finally made its way to America, where Irving Bluestone of General Motors used the term 'quality of work life' to describe a program that helped develop and increase both job satisfaction and productivity (Martel & Dupuis 2006). This activity culminated in an international conference on quality of work life in 1972 (Martel & Dupuis 2006; Sundaray, Sahoo & Tripathy 2013). Linked with the research emerging on broader quality of life measures (Burchell et al. 2014) the International Council for the Quality of Working Life was established in 1973 to investigate health and working conditions (Martel & Dupuis 2006; Rai 2015). Nadler and Lawler (1983) also recognised that foreign manufacturers' managerial practices were producing more effective results related to this concept. In particular, the Japanese are known for decision-making by consensus, as well as for their high-quality output and efficient productivity. However, practices such as lean

manufacturing have, in fact, been criticised and deemed 'management by stress' (Babson 1995), because they increase management control and shift the power upwards, while reducing resources and worker control.

QWL researchers studied the links between employees' perceptions of a good job and productivity. By the 1980s focus had turned to psychological health in the workplace, the nature of stress, control and participation. A decade later, attention shifted to work-life balance and time spent working (Burchell et al. 2014). In 1999 the concept of Decent Work was promoted by the International Labour Organisation. More recently QWL has been placed on the European Commission's agenda, along with social inclusion (Royuela, López-Tamayo & Suriñach 2008).

4.3.2   Definition of QWL

Martel and Dupuis (2006) reviewed the literature from the late 1970s to the early 2000s and found six definitions, including Nadler and Lawler's from 1983, that concentrate on the individual, organisation, society, job satisfaction, work environment, participation and the dynamic and temporal aspects of different roles, ages and career stages. After reviewing the literature on quality of life, they define QWL, based on the quality of life systemic inventory as follows:

> "quality of work life, at a given time, corresponds to a condition experienced by the individual in his or her dynamic pursuit of his or her hierarchically organised goals within work domains where the reduction of the gap separating the individual from these goals is reflected by a positive impact on the individual's general quality of life, organisational performance, and consequently the overall functioning of society" (Martel & Dupuis 2006, p. 355).

However, Nadler and Lawler (1983) identify six definitions, as shown in Figure 2, based on the evolution of QWL from the 1950's to the 1980's.

Figure 8: Definitions of Quality of Working Life

First Definition: QWL = Variable
(1969–1972)

Second Definition: QWL = Approach
(1969–1975)

Third Definition: QWL = Methods
(1972–1975)

Fourth Definition: QWL = Movement
(1975–1980)

Fifth Definition: QWL = Everything
(1979–1982)

Sixth Definition: QWL = Nothing

(Source: Nadler and Lawler 1983, p. 26)

The first sees QWL as a variable, the outcome of the reaction to, or consequence of, the experience of work, such as job satisfaction. The second is an approach used by employees and employers to work collaboratively to improve joint outcomes. The third is a methodology whereby QWL is utilised as a tool to create increased productivity and satisfaction. The fourth reflects the emergence, in the late 1970's, of QWL as a movement and an ideology with the ideals of participative management. In the fifth definition QWL appears as a complex global concept that incorporates 'everything' - a panacea for all productivity and quality issues. In reaction to the fifth definition, which will inevitably lead to failure, Nadler and Lawler (1983) asserts that QWL then becomes meaningless. Thus in the sixth definition it means 'nothing'. Building on this history, Nadler and Lawler (1983) assert that QWL is concerned not only with productivity, but with how work can benefit the workers and their participation in organisational decision-making. They go on to extend their definition:

"… quality of work life is a way of thinking about people, work and organisations. Its distinctive elements are (1) a concern about the impact of work on people as well

as on organisational effectiveness, and (2) the idea of participation in

organisational problem solving and decision making." (Nadler & Lawler 1983, p. 26)

Clearly there are a plethora of definitions; the literature is limited and not based on a

particular theory or technique, and the conceptualisation of QWL can vary depending on

the sector or the organisational culture. In this study QWL is defined as incorporating:

- a concern about the impact of work on people as well as on organisational
  performance;

- the idea of participation in organisational problem-solving and decision-making;
  and

- the impact of work on the community in which the individual worker and
  organisation is situated.

4.3.3   Effect of QWL on Marginalised Workers

Employment is a key facet of life which provides financial and social benefits, along with

opportunities for social inclusion (Rose, Daiches & Potier 2012). Those who are able to

participate in employment can realise their potential, facilitate recovery from their

situations, gain acceptance and support from society and experience job satisfaction (Ho &

Chan 2010). Good QWL leads to a broader life satisfaction in workers' social, leisure and

family domains and has an overall positive impact on mental and physical wellbeing

(Tongo 2015; Villotti et al. 2012).

Job satisfaction is a dimension within the broader concept of QWL which has been defined

as the "democratization of the workplace", "worker protection", "work environment

improvement" or the exchange relationship between employee and employer

(Chitakornkijsil 2010, p. 215; Rai 2015). The literature reveals that job satisfaction

generally has an impact on overall life satisfaction (Villotti et al. 2012). Pagán (2013)

proposes that job satisfaction is a combination of various dimensions including "physical

effort, time pressure, level of freedom, capability to develop new skills, support in the

workplace, recognition of the work, salary, promotion prospects and job security" (Pagán

2013, p. 861). He then goes on to demonstrate that older workers with disabilities increase satisfaction in their employment when they receive recognition for good performance and support from within their organisation rather than from external providers such as job coaches. Good QWL encourages job satisfaction, which in turn enables employees to enjoy their life and has the benefit of fostering organisational efficiency and profitability (Sundaray, Sahoo & Tripathy 2013).

For workers who are experiencing social exclusion, QWL becomes more crucial. People living with a mental illness, like those with a physical disability, experience marginalisation due to the taboos and ignorance surrounding their condition. For example, Browne (1999) discovered that individuals with schizophrenia, who experienced good QWL, not only experienced improvement in their economic and social lives, but also found that it aided their rehabilitation more effectively than occupational therapy programs. A study by Lanctôt, Durand and Corbière (2012) found that people with mental health disorders who worked in social enterprises experienced a high QWL, which enabled longer job tenure. Further, their study identified themes of interpersonal and intrapersonal aspects of QWL, including experiencing a sense of belonging, the feeling of being a good worker and positive relationships with supervisors and co-workers. The social model of disability argues that society creates social, environmental or attitudinal barriers, which prevent the participation of people with disabilities (Pagán 2013). Thus, workplace accommodations are solutions created for socially excluded individuals, to support their successful participation in the work environment, and to generate equal access, benefits and privileges. Workplace accommodations, or workplace adjustments, are defined as modifications made to the work environment or to the duties of a role that enable socially excluded individuals to perform their work, or experience the benefits of employment (Dong & Guerette 2013; McDowell & Fossey 2014). These accommodations enable participants to maintain employment and to cope with stresses, illnesses or relapses. Such accommodations can include flexibility in hours, schedules and duties, training to assist with learning and having flexible and friendly supervisors and colleagues (Villotti et al.

2012). Pagán (2013) and Villotti et al. (2012) advance three factors which they deem critical for participant workers to succeed in the workplace, namely self-efficacy, or the persistence in the face of difficulties and challenges, recognition and being valued for work performed, and feeling supported by colleagues and supervisors, rather than by family or external support workers (Pagán 2013; Villotti et al. 2012). Social enterprises, as discussed in detail in the previous chapter, appear to be well placed to enhance QWL through the provision of workplace accommodations for employees experiencing social exclusion.

4.4   Conceptual Framework

Leshem and Trafford (2007) describe the conceptual framework as the bridge between the paradigms and the investigation of the issue, providing a theoretical base from which to design and interpret research. They introduce explicitness to the research process. The conceptual framework used in this study emerged from the work of Gidley, J et al. (2010) and the literature on social enterprises, social inclusion, social exclusion, empowerment and QWL. It is shown in Figure 3 and describes the key concepts within which the research is bounded. According to the conceptual framework, through a nested schema, participant workers can experience varying degrees of social inclusion and QWL (Gidley, J et al. 2010) through access, participation and empowerment.

Figure 9: Conceptual Framework of a Participant Worker's Experience of Social Inclusion & QWL. The Access-Participation-Empowerment model
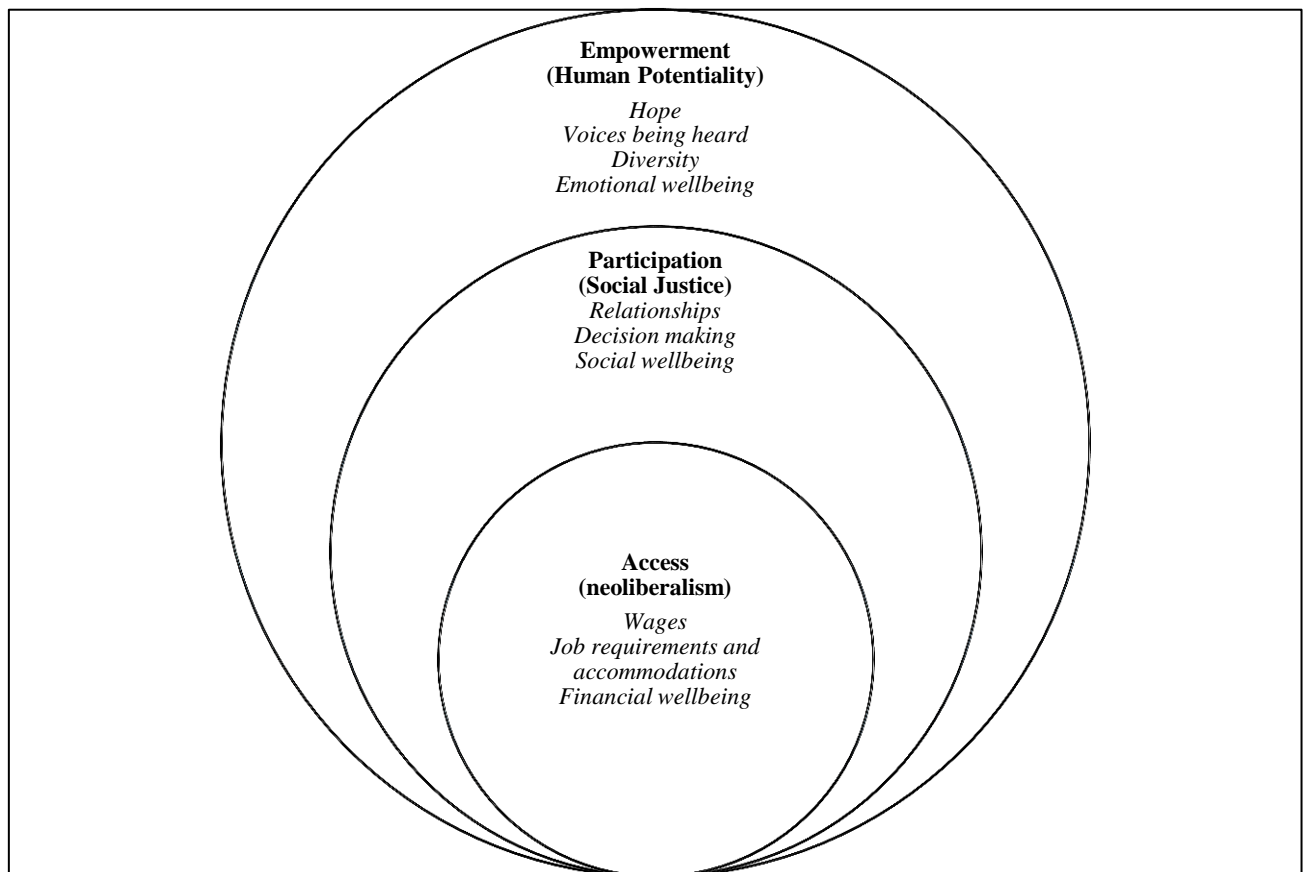
(Adapted from J Gidley 2009)

The first dimension of the access-participation-empowerment model offers the lowest levels of social inclusion and QWL, is based on a neoliberal ideology and considers how participant workers gain access (financial inclusion) through their employment at a social enterprise. In this sphere, access to social inclusion and QWL is gained through receipt of wages, tangible benefits (Sundaray, Sahoo & Tripathy 2013; Villotti et al. 2012), and the requirements of the job. Social enterprises have the ability to offer work flexibility and job accommodations for marginalised participant workers. Furthermore, financial wellbeing considers their ability to afford essential items, to manage debt to save and to acquire assets (Teasdale 2010; Teerakul et al. 2012).

The second dimension is more inclusive than the previous one as it is framed within a social justice ideology of social inclusion and QWL. So it considers the participant workers'

relationships with their stakeholders, particularly if there are non-judgemental, and accepting attitudes at the workplace (Hall 2009; Lanctôt, Durand & Corbière 2012; Pagán 2013; Villotti et al. 2012). Through participation and decision-making, it identifies the level of participation, the participant workers' ability to make decisions in their work and the level of control they have over their work-life balance (Burchell et al. 2014; Tongo 2015). Social wellbeing incorporates their engagement with family, friends and society and their level of participation in civic, leisure and community activities (Browne 1999; Hall 2009; Teasdale 2010; Tongo 2015).

The third dimension builds on the aspect of social justice and is rooted in a human potential ideology of social inclusion and QWL. Thus, it views hope as a means for the individual to transform from powerlessness and move towards positive development, which, in turn enables the participant worker to commence long-term planning and envision a better future (Gidley, J et al. 2010; Gidley, JM et al. 2010). At this level, the voice of the participant worker is heard, listened to and engaged with, by exclusionary agents. As a result participant workers are able to represent themselves and seek to shift structural power imbalances. This dimension also recognises the diversity and lived experience of participant workers which can inform work practice, research and policy (Gidley, J et al. 2010). Finally emotional wellbeing regards the participant worker's feelings of safety, sense of belonging, empowerment, happiness and satisfaction with life (Beyer et al. 2010; Sundaray, Sahoo & Tripathy 2013; Villotti et al. 2012).

The conceptual framework provides this research study with the structure to address the research question.

How do participant workers employed in social enterprises in Jamaica, experience quality of work life and social inclusion through access, participation or empowerment?

4.5   Chapter Summary

Given the complex nature of social exclusion and social inclusion, this chapter reviewed the literature on social exclusion, examined the history of the concept and considered

definitions, contributing factors and consequences of social exclusion. It also considered the structural aspects of social exclusion and the need for social action to overcome these aspects. The chapter moved onto a detailed exploration of social inclusion and empowerment, before progressing onto the literature of quality of work life and providing a definition for the study. The conceptual framework which, was developed from the literature was then examined, along with the research question. The following chapter will investigate the methodology used in this research study.

CHAPTER 5   METHODOLOGY

This qualitative research project investigates participant workers in social enterprises and their experiences of social inclusion and quality of work life. The research method takes a structured-pragmatic-situational case-study approach. This chapter discusses the choice of research method, as well as the limitations of the methods selected, and offers a justification for the approach used. In summary, the research adopts a case-study approach which is located in a broader political economy analysis. The data sources comprise interviews with participant workers, and their stakeholders, an examination of company documents, newspaper articles and websites a literature review and observations while in the field.

5.1   Research Method

There is a broad assortment of qualitative research methods available to the researcher, each grounded in different ontological and epistemological frameworks. Qualitative research is appropriate when the variables are unknown, enabling an emergence of themes (Creswell 2014). It is suitable for use in expanding understanding, gaining insight into opinions or motivations and in developing ideas or hypotheses for quantitative research. Qualitative research is also a valuable method of empowering people to share their stories as they can represent themselves and articulate their situations.

Creswell (2014) describes eight characteristics of qualitative research: the researcher is the key instrument; he/she collects multiple sources of data; the data are organised inductively; the investigation focuses on the meaning the participants bring to the issue; it is an emergent process; it is viewed through a theoretical lens; it is subject to multiple interpretations, from the researcher to the reader; and it describes the overarching issue by identifying interacting factors rather than cause-and-effect relationships.

This study's aim is to identify how participant workers experience quality of work life and social inclusion for participant workers at social enterprises. The research employs a case-

study approach. Case-studies are a preferable methodology when the researcher has no control over behavioural events, wishes to focus on contemporary events and requires a comprehensive description of the phenomenon (Yin 2009). Case-studies acquire more detail about the phenomenon, facilitate transferability of tangible, specific data and are well suited to theory-building (Mertens 2008). Furthermore, this approach allows the personal values and experiences of the participant workers to be taken into account. Case-studies are usually conducted within the naturalistic settings of the phenomenon, which for this study was within the social enterprises and communities of the participant workers. According to Dubois and Gadde (2002) there is a danger that case studies can be narrative-heavy and difficult to replicate and provide limited support to theories. To counter this, they recommend the use of systematic combining, which is a process that matches and triangulates theory, data and analysis iteratively. In this way the researcher is able to move continuously between the empirical world and a model world, using abductive logic to infer the most likely explanation. On the other hand Pan and Tan (2011) argue that their eight-step structured-pragmatic-situational approach is more appropriate for inductive, exploratory case-studies. Their practical instructions involve reading widely, deconstructing, rebuilding theory, and interviewing at least 15 participants to avoid bias.

The researcher applied an advocacy worldview to this study because the "research contains an action agenda for reform that may change lives of the participants [and] the institutions in which individuals work or live" (Creswell 2014, p. 9). This approach considers the community's cultural perspective rather than operating from a Eurocentric, patriarchal or mainstream viewpoint, and it also enables an examination of the power imbalances around social issues. For example, this approach views disability as a social issue rather than a medical or biological one and focuses on a community's strengths rather than its deficits.

The conceptual framework, the access-participation-empowerment (APE) model presented in Chapter 4 emerged through an inductive and iterative process that involved moving

back and forth between the data and the literature. Using the APE model in this research enables analysis of the experiences of participant workers and their stakeholders, as well as a consideration of the structural injustices they face which can be used to evaluate instances of social inclusion and quality of work life through the lens of economic access, social justice and human potential.

5.2 Literature Review

A literature review is a critical part of a study in that it provides a foundation for the need for the study, enables an identification of the research problem and positions it within the literature (Creswell 2007). Furthermore, it can provide a valuable summary of an area with which the reader is not familiar, as well as determining shortcomings in existing studies (Knopf 2006).

The literature review in Chapters 3 and 4 provided the background to examine the socio-cultural and political economic context within which social enterprises are situated and the concepts of social inclusion, social exclusion and quality of work life were also reviewed. This process was utilised to develop the conceptual framework discussed in Chapter 4. The review of the literature also exposed the power structures and exclusionary agents that are inherent in society and how they contribute to the disempowerment of the marginalised, that "real lives at stake that are being determined by those in power" (Mertens 2008, p. 29). Denzin and Lincoln (2003) remind researchers that participants should not be called 'subjects,' a word with implicit colonial connotations. Therefore, the researcher was conscious of where she was situated within those power dynamics as a socially mobile, middle-class woman from the diaspora, who had returned from '*foreign*', to conduct the research. There was a possibility that this power dynamic could bias the data or negatively influence the participants. To mitigate this, the researcher followed Mertens (2008) recommendations of sharing some commonality with research participants, either through work experience, ethnic heritage, or other characteristics and for the researcher to identify where there may be a power differential and to 'know thyself'. Thus, the researcher

used empowerment strategies such as conducting group interviews rather than one-on-one interviews with participant workers, in order to create a safe space for them to share their experiences and to feel catalysed into action. She immersed herself in each setting, 'hanging out', and getting to know the participants, sharing her own story, and introducing them to her locally-based family members, who drove her to each location. It was important for the researcher to ensure at all times that the community, and each individual who participated, felt respected and empowered to share their experiences.

The literature also revealed the human potential model proposed by Gidley, JM et al. (2010), which frames varying degrees of social inclusion as access, participation or empowerment, within the ideologies of neoliberalism, social justice and human potential. From this model emerged the linkages between the economic and social ideologies, social inclusion and quality of work life through the outcomes which not only resonated with the researcher but also aligned with the data.

Finally, by reviewing the literature, it became apparent that there were gaps identified. In particular there is a paucity of research into social enterprises operating in developing countries. Moreover, there is scant reference to the empowerment of those engaged with social enterprises as participant workers or beneficiaries, and next-to-nothing on human potential ideology and social enterprises. Therefore this thesis elucidates an area which no other studies have addressed, that is investigating the experiences of participant workers using the access-participation-empowerment model. For that reason this thesis makes a significant contribution to the literature on social enterprises by providing an evaluative framework with which to assess experiences of social inclusion and quality of work life on participant workers.

5.3   Case Study Design

The design of this case study was guided by use of systematic combing (Dubois & Gadde 2002) and the structured-pragmatic-situational (SPS) approach outlined by Pan and Tan (2011) and shown in Figure 10, as it was a flexible, systematic and explicit process.

Figure 10: A structured-pragmatic-situational approach to conducting case studies
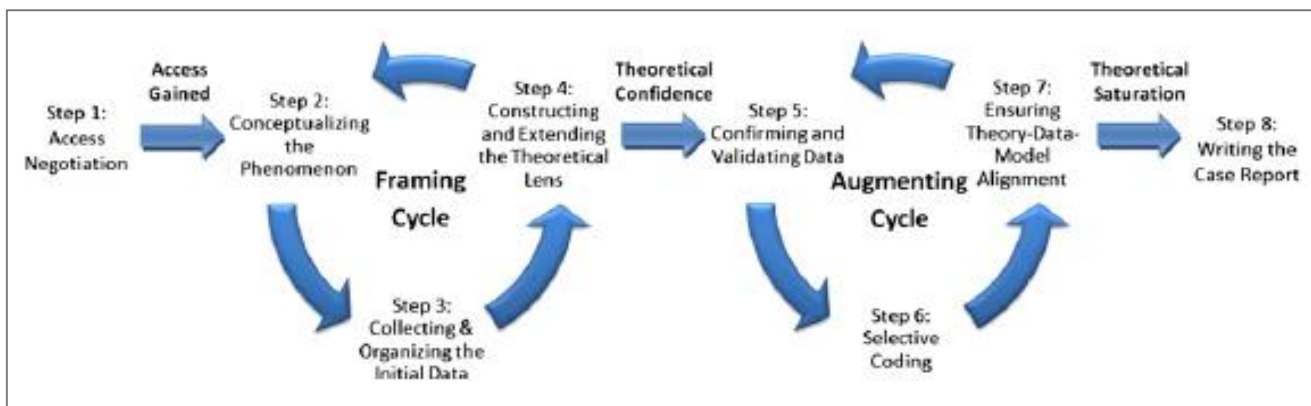
(Source: Pan and Tan 2011, p.164)

The authors of the SPS approach argue that it is particularly suited to exploratory case studies and to novice researchers with limited experience in case-study research. Steps two to four are the framing cycle which builds theoretical confidence, and steps five to seven provide theoretical saturation.

Step 1: Access Negotiation

Rather than begin with a research question or case design, the SPS approach asks the researcher to identify an interesting case to which they can gain access. There may be difficulties in trying to gain access to unsolicited contacts and organisations, so it is recommended that the researcher gain access to a case via a local collaborator or through a personal contact.

Step 2: Conceptualising the phenomenon

To prepare for the data collection phase, it is necessary to develop a mental concept of the phenomenon and to be aware of the potential theoretical constructs. This is achieved by reading widely to gather background information of both the organisation and phenomenon, theories that relate to the issues to be studied.

Step 3: Collecting and organising the initial data

Primary source data are gathered through interviews. Ideally the first interview should be with a participant, perhaps a gatekeeper, who can give a broad background on the phenomenon and identify the right interviewees. Insights from the first interview can enable the development of a strategy for the collection of further data and be used to prepare the data for analysis and theory-building.

Step 4: Constructing and extending the theoretical lens

In this step the theoretical lens is selected, and then deconstructed into its constituent parts to create a set of categories. These categories are used to organise the data. This is an adaptive and dynamic process, as additional categories can be added to the lens.

Step 5: Confirming and validating the data

On completion of the framing cycle, the researcher can ensure the validity of the data collected. First, it is important to ensure there are enough data; Pan and Tan (2011) recommend that interviews be conducted with at least 15 individuals to avoid bias by having a wide range of voices. These should be triangulated using multiple data sources or pieces of evidence (Yin 2009). If there are conflicts in the interpretation between the data, an objective, neutral third party source can be utilised to help the researcher make a choice about the data to be included.

Step 6: Selective coding

Selective coding is an iterative process that pinpoints an overarching concept which covers and corroborates the identified codes and categories (Saldaña 2010). The SPS approach advocates the adoption of a narrative strategy to condense, clarify and summarise the data into story form. This can be used later as part of the case report. The narrative is then augmented with data summary devices such as tables replete with quotations from the interviewees. In this way, the researcher can detect areas which require more data. The structure that is built through each iteration of the selection coding process adds to the development of theory.

Step 7: Ensuring theory-data-model alignment

This step checks the alignment of the emergent model with the theory and data through constant comparison and checking that the data match the new model. At the point of theoretical saturation or data sufficiency, i.e. when the data start to overlap or cannot be extended further, then the emergent model is reduced to a set of propositions explained using the theory.

Step 8: Writing the case report

Using a structured approach that establishes a clear chain of logic ensures that all key data are included, creates efficiency in writing and strengthens the links between the sections of the report. Furthermore, the strategic use and placement of data summary devices assists with the summation and authentication of the data as well as encapsulating information succinctly, ensuring clarity for the reader.

While this is a practical approach, there are limitations which should be noted, first that it works best for inductive, exploratory case research. Second, it has been developed by experienced case researchers with tacit knowledge that an inexperienced researcher may not possess. Thus the researcher read widely on case-study methods, field work, collecting qualitative data and interview techniques.

5.4   Research Process

Ethics approval was granted for this study on 23 November 2015 by Victoria University's Human Research Ethics Committee as the study involved human research participants. The study was conducted in Jamaica at two social enterprises, Superior Crafts and More, and Cockpit Treats, both of which are currently being supported by the JN Foundation's Social Enterprise Boost Initiative (SEBI). This provided relatively easy access to them as the researcher is a former employee of JNBS. Superior Crafts and More is based in the capital city and focuses on assisting people with disabilities, while Cockpit Treats is a rural operation, with women as its target group. Thus these two social enterprises provide interesting contrasts between urban and rural, and between disability and gender. For

practical reasons, both enterprises were within easy access of the researcher's family's city and country homes.

5.4.1   Data Collection

The data were collected through primary sources, principally semi-structured interviews with participant workers and stakeholders, along with direct observation, in Jamaica in January and February 2016. Secondary data were obtained from review and analysis of company documents, websites and newspaper articles over a period of 12 months from October 2015 to October 2016, and from a review of the relevant literature. The recruitment process and participant characteristics are detailed next.

5.4.2   Research Participants

It should be noted that the researcher refers to those involved in this project as interviewees or participants, which emphasises their engagement and participation, rather than conforming to the hierarchical connotations of the term 'research subject'. Potential participants were selected via email discussion with the manager of the JN Foundation who spoke with and emailed them, asking for their willingness to be involved in the project. Their contact details were then forwarded to the researcher. Initially the researcher had contacted the social enterprises via email, while still in Australia, but had received no response. Understanding the limitations of internet access in Jamaica, the researcher subsequently made contact via telephone. On arrival in Jamaica she again made telephone contact with the social enterprises and the JN Foundation team and confirmed their participation in the project. Thus, the participants of the social enterprises were recruited directly by telephone contact from the researcher.

Government and academic stakeholders were selected from those who had either worked directly in the field or had social enterprises as an area of interest and were contacted directly by email before the researcher arrived in Jamaica. All were happy to be involved. The exception was the funding partner United States Agency for International

Development, which requested a copy of the interview questions, which were emailed, and then declined to be involved.

In total, sixteen participants were interviewed, six from Superior Crafts and More, five from Cockpit Treats, one from the JN Foundation, one from the University of West Indies, one from Roger Williams University, one from the Rural Development Agency, and one from the Scientific Research Council.

Table1: Participant Profile

TYPE	Superior Crafts and More	Cockpit Treats	Other stakeholders
Role	5 Participant Workers 1 Manager	4 Participant Workers 1 Manager	2 Government 1 Funder 2 Academics
Gender	5 females 1 male	5 females	3 females 2 males
Marginalisation	1 blind 4 vision-impaired 1 low educational attainment	4 unemployed 1 retired 5 rural dwellers	
Level of education	5 Secondary Education 4 vocational training	5 Secondary Education	2 postgraduates 3 graduates
Social Class	1 middle class 5 working class	5 working class	5 middle class

Table 2: Research participants from Superior Crafts and More

Participant Worker	How marginalised	Role(s)	Other information
Miss Webb*	Visually impaired	Manager Representative of Superior	Works part-time at Superior Crafts and More, also has

Participant Worker	How marginalised	Role(s)	Other information
Age: 50s		Crafts and More on the JSFB board. Former board member prior to manager role. Associated with JSFB 1983; 2008 with Superior	another part-time job elsewhere.
Abby* Age: 40s Has an adult son and primary school-aged daughter	Blind	Craftswoman President Management committee member Started in 2000-2009 and then returned 2011 to present	Attended Salvation Army School for the Blind and Visually Handicapped in Kingston as a day pupil. Went to the Abilities Foundation and studied IT. Worked as a short hand typist but aspired to be a craftswoman.
Mr Mead* Age: 50s Has an adult daughter	Poverty and limited education	Wicker Man Supervisory Committee 2011 to present	Grew up in extreme poverty that interfered with his schooling. He left school at age 14 achieving Grade 9. He would have like to have been an accountant but he had to work and hustle to look after his family from the age of 11. He produces beautiful and complex wicker furniture. Loves to be engaged and lose himself in a piece of work, finds chatter distracting. Sighted participant worker.
Miss Bain* Age: 60-70 Married, her	Visually impaired	Cleaner	Oldest member of the group, originally from a rural community. Went to a

Participant Worker	How marginalised	Role(s)	Other information
husband is also blind.			mainstream primary school and they discovered she couldn't see properly, so was sent to Salvation Army School for the Blind in Kingston. Enjoyed school, but was expelled for fighting and so was not able to graduate. She became a childcare worker. Ambition was to be a radio announcer. Her school friend was the former manager and invited her to work with them. She sees the group as family.
Miss Wickham* Age: 40s Married, her husband is also blind, with two secondary school aged children who attend a private school	Visually impaired	Craftswoman October 2015	Middle class and led a sheltered life. Went to a boarding school, School for the Blind. Wanted to be a hairdresser but unable to, due to being unable to see and handle the chemicals, so did office training. Has also trained in massage and caning. She gives head and shoulder massages in Emancipation Park.
Bettina* Age: 20-30 Has a daughter in primary school	Visually impaired	Craftswoman Supervisory committee member Feb 2005 to present	Youngest member of the group. Born with cataracts. Went to School for the Blind from the age of six. Learnt

Participant Worker	How marginalised	Role(s)	Other information
			braille. Didn't like agriculture classes. Trained in IT at the Abilities Foundation. Spent time unemployed. Trained in cording and caning by Creative Craft Plus. Will try anything in between jobs to earn a living.

*not their real name

Table 3: Research participants from Cockpit Treats

Participant Worker	How marginalised	Role(s)	Other information
Victoria Milne* Age: 60s Divorced has her elderly mother, nephew and his family (including a young baby) living with her.	Unemployed	Manager President Baker	Is the driving force behind the organisation. Passionate about social enterprises and their products. Had previously worked as a public servant in a government department.
Charlotte Bailey* Age: early 20s Married with two children	Unemployed	Treasurer Baker	Worked as a teacher's assistant in a nearby village. Joined the group in 2013.
Cassandra Kendall*	Unemployed	Baker	Previously a livestock farmer and had a little grocery shop but it closed

Participant Worker	How marginalised	Role(s)	Other information
Age: 40s Married with school aged children			down. Very passionate about social enterprises.
Theresa White* Age: 60s Grandmother	Unemployed	Baker	Used to work as a Geriatric Nurse. Loves baking. Had her six month old grandson with her at the interview.
Marie Silverman* Age: 70s Married	Retired	Sponsor Member	Returned resident. From Ulster Spring originally, emigrated to the UK worked at Scotland Yard in a civilian role. Provides supports to the group both financially and in kind (through donating equipment and the use of her home kitchen).

*not their real name

Table 4: Stakeholders

Name	Role	Other information
Harriet Fels* Age: 60s Retired	Rural Agricultural Development Authority 1973 - 2012 Grassroots Extension Outreach Officer from 1973; final role before retirement: Director, Social Services and Home Economic Unit.	Had established dozens of rural women's groups that transformed into agro processing social enterprises based on the local area's produce.
Mr Blake* Age: 60s	Scientific Research Council (SRC) Consultant Trains in food processing	Was employed by the SRC but now retired. Works as an independent consultant on a variety of projects. In the 1970s started his career working at a rural based agro processing social enterprise.
Saffrey Brown Age: 40s	JN Foundation General Manager SEBI Program	Originally from Trinidad, lived and worked in the UK. Most of her career has been working in not-for-profits and social enterprises. Developed the Social Enterprise Boost Initiative (SEBI) program with Dr K'nife and applied to US AID for funding.
Dr Knife Age: 40s	University of West Indies	Activist and academic researcher. Rastafarian. Grew up in the 'Jungle' Arnett Gardens (garrison community). His research interests include sustainable community interventions and social enterprises. Provides the evaluation and research for the SEBI program.
Dr Hume Johnson Age 40s	University of Roger Williams Re Imagine Jamaica Conference Founder	A member of the Diaspora as she lives in USA. Passionate about solving Jamaica's social issues and revealing the authentic Jamaica. Research collaborator with Dr K'nife.

*not their real name

5.4.3 Data Collection

Prior to each interview, the nature and rationale of the research was explained in detail. Participants who could read were given a copy of the participant information and plain language statements (see Appendix 1 and 2) to read and keep. This statement detailed the nature of the research, the interview process, confidentiality and the right of participants to withdraw from the study at any time. The researcher read this aloud for those who couldn't read. Consent forms (see Appendix 3 and 4) were provided for those who agreed to have their interview recorded. Those who couldn't write digitally recorded their consent. None of the participants withdrew from the research project.

Fourteen of the 16 interviewees consented to having their interviews digitally recorded, two declined and their interviews were recorded in writing. All the interviews were semi-structured, fifteen were conducted face to-face and one was by telephone.

Conducting face-to-face interviews enabled the researcher to ask open-ended questions, gain a richer understanding of the phenomenon and collect data in a way that did not 'pathologize' or disempower participants (Mahuika 2008; Renzetti & Lee 1993). Moreover, interviews enable a deeper examination of the phenomenon. The researcher followed the lead of the participant workers in noting that they enjoyed each other's company and worked collaboratively in groups – this was their community and safe space. Consequently interviews with participant workers at each social enterprise were conducted within their self-selected groups, at their premises. Each participant was asked the same question and given the time and space to reflect and provide an answer. As a people, Jamaicans tend to be gregarious and relatively easy-going, with opinions on just about every subject. This is reflective of their African ancestry with its traditions of oral history and storytelling, and in part due to a regime which made it illegal for slaves to learn to read and write. Therefore, the researcher was not concerned that group interviews would negatively impact on participants' answers, but no questions relating directly to individual financial circumstances were asked, in order to protect privacy. The managers and stakeholders

were interviewed separately, although the Cockpit Treats manager also participated in the group interview.

Conducting semi-structured interviews enabled participants to share their experiences (Diochon 2010) and provide a voice for the marginalised. One danger of interviews is that they can be affected by bias related to the questions posed or the interviewer's preparedness and personal appearance. Bias can also occur if interviewees don't understand the questions, deliberately give false answers or do not give their true opinions (Sekaran 2003). On the other hand, a respondent may feel an exaggerated need to please the interviewer or may be affected by the lack of anonymity (Veal 2005). Given that these participant worker interviews were conducted in a group setting, anonymity was not an issue and participants were unlikely to exaggerate, as their colleagues were in the room. In fact the collegial atmosphere meant that they explained the questions to each other if one of them did not understand the researcher's accent or the meaning of the question. As previously discussed in Chapter 4, the conceptual framework was used to develop the interview questions (see Appendix 5, 6 and 7) which explored the dimensions of emotional, physical, social and financial wellbeing of participant workers within social enterprises.

5.4.4 Direct Observation

Observation is the recording of people, events or objects by human, mechanical or electronic instrument, resulting in either narrative or numerical data (Hair et al. 2003). This approach enables the researcher to understand events in real time and the context in which the case is situated (Yin 2009) and is a distinct characteristic of case-study research (Yin 2012). However, it can be a time-consuming process, and subject to the personal perspective of the researcher, and the event or phenomenon may unfold differently simply because it is being observed (Yin 2009, 2012). Creswell (2007) recommends that researchers follow an observation protocol which includes identifying and gaining permission to access the site, identifying exactly what to observe and designing an observational protocol (see Appendix 8) which includes descriptive and reflective notes. In

this study the researcher had an opportunity to spend time conducting and recording observations both outside of and during the interviews while on site.

5.4.5   Data Analysis Process

The interviews were recorded digitally or in writing and observations were recorded in writing. The audio interviews were transcribed verbatim using Express Scribe Transcription Software, which took 54 hours. The researcher personally transcribed the audio as the majority of the interviewees spoke in Jamaican patois. This would have been difficult for a non-patois speaker to understand, as significant meaning is carried not only by the words but also by the subtleties of tone, and the way in which particular expressions are used. The advantage of this was that the researcher was fully immersed in the data and gained rich and deep insights.

Once transcribed into Microsoft Word, the interviews were read alongside the direct observation data and the researcher summarised her first impressions. Each transcript was printed out with a large right-hand margin and double-line spaced, and the interview data were broken up into units of one sentence. A line-by-line analysis was conducted using a one to three word summary or code using In Vivo Coding to describe the meaning of the text within the participant's language. In Vivo Coding is the best approach for the analysis of data from the marginalised as it ensures that their voices are heard, and their meaning understood and captured (Saldaña 2010).

Using Microsoft Excel these codes were written up across two columns. The codes were copied into a second sheet and sorted alphabetically, and then grouped. A constant comparison of the codes and data was conducted by the researcher then the data were reviewed against the codes. The initial hundred or so codes were grouped into 10 to 20 categories. These categories were then reduced further to seven codes which became the overarching themes. The codes were examined a second time and then considered against the following questions:

1. What appears surprising?

2. What does the interviewee state as explicitly important?

3. What is repeated several times?

4. What appears similar to a theory or concept?

5. Are there any actions, activities, differences, opinions or processes that are exposed?

6. What themes emerged?

The interview data were then analysed a third time to cross-check them against the emergent themes. The data from the interview transcript were highlighted by theme, and quotes were taken from the data and compiled under each theme in a Microsoft Word table. Thence, the researcher examined the themes, and the connections between the themes, which emerged from each interview and designed models which articulated the emergent themes (see Appendix 9). From these models, the APE model emerged as the most appropriate lens through which to re-analyse the data. The literature on empowerment theory was then reviewed and the transcripts were re-analysed using the APE model. The first dimension of the APE model, assessed participant workers' experiences of economic inclusion and quality of work life through an examination of their earnings, job requirements, job accommodations, financial wellbeing and the effectiveness of the organisation. The second dimension of the APE model, reviewed their participation by analysing their relationships with colleagues, the ability of participant workers to be involved in decision-making, their social wellbeing outside of the social enterprise and the impact of the work on participant workers themselves. The third dimension of empowerment, examined their experiences of hope, and the ability to plan for the future, the opportunities for their voices to be heard by, listened to and engaged with exclusionary agents. It also investigated their experiences of emotional wellbeing outside of the social enterprise and the impact that the social enterprise on the community in which it was located.

5.5   Rationale of the Researcher and Research Question

Research interest in the experiences of participant workers originated from the researcher's personal experience of managing two Australian social enterprises, which employed participant workers, as discussed in the rationale in the first chapter. What struck her as significant was the lack of consideration of the transformation of participant workers from socially excluded to becoming more included, and the dominance of the discourse concentrating on economic solutions as social impact. This fuelled the researcher's wish to study the personal experiences of social inclusion and quality of work life of participant workers. Furthermore, by setting the study in Jamaica, the researcher could better understand the experiences of social exclusion within the context of a developing country.

Thus, the main thrust of the research is to explore how participant workers and social enterprises are affected by certain drivers. More specifically, understanding the connection between social inclusion, quality of work life and empowerment is a prime aim of this research. Identifying and suggesting potential policy implications or improvements is another crucial goal. Thus the research question considers factors influencing participant workers.

How do participant workers employed in social enterprises in Jamaica experience quality of work life and social inclusion through access, participation or empowerment?

5.6   Chapter Summary

This chapter has provided an explanation of the methodology and research process, of this qualitative research study. The data, along with the literature, were examined iteratively from which the theoretically-based lens of the APE conceptual framework emerged. The case study, research approach has been justified on the basis that this is an exploratory study. The data were collected from semi structured interviews with five stakeholders and 11 participant workers from two social enterprises in Jamaica, field observations, a review

of the literature and examination of company documents, newspaper articles and websites. The data were analysed using In Vivo Coding to retain the meaning of the text within the participants' language. The data and literature were systematic combined, triangulated and re-analysed through the APE model. Through the APE model, social and inclusion and quality of work life was investigated first as access, through the participant workers' experiences of economic inclusion, financial wellbeing and the effectiveness of the organisation. Second, participation was analysed through the ability of participant workers' to be involved in decision making at their social enterprise, their experiences of social wellbeing and the impact of the work on themselves. Finally empowerment was investigated through participant workers' ability to plan for the future, their emotional wellbeing, to be listened to and engaged with exclusionary agents have and the impact of the social enterprise on the community in which is located. Finally an explanation was provided for the design of the research question. The next chapter will present the research findings of the data collection.

CHAPTER 6   FINDINGS

This chapter presents the findings from the research study's examination of experiences of social inclusion and quality of work life at social enterprises, using the access-participation-empowerment (APE) model described in Chapter 4. Starting with an introduction to social enterprises in Jamaica, the chapter provides an outline of the two chosen social enterprises - Cockpit Treats and Superior Crafts and More. The chapter then offers the findings, which are presented as a response to each dimension of the APE model. First, it articulates how participant workers experience access as economic inclusion and organisational efficiency. Second, it examines how participation is enriched through their involvement in decision-making within the social enterprise, through positive engagement with co-workers, and more broadly through social wellbeing and the impact of the work on the participant worker. The final dimension examines how empowerment is attained through emotional wellbeing, engagement with exclusionary agents, and experiences of hope. It also considers the impact of work on the community in which the participant worker and social enterprise is located.

6.1   Social Enterprises in Jamaica

Overall the landscape for social enterprises is ad hoc and inconsistent due to both the lack of policy framework to support the sector's development, and the social enterprises' limited capacity and resources with which to operate. A recent study (K'nife 2016) reviewed some 3,900 organisations that could be considered social enterprises. The majority had been operating for less than 10 years, and had a clear economic focus to be financially sustainable through income-producing activities, generating annual revenues of less than J$100,000 (approx. AU$1,000). Only 25 per cent sought investment capital with which to capture a market opportunity, to increase their competitiveness, to improve their operational efficiency or to increase their social value creation. The majority preferred to seek grants, gifts or soft loans, due to their risk-averse nature, low social capital, limited

networks and skillsets to negotiate and manage formal financial products. Despite this, some 70 per cent were profitable or at break-even point. Social enterprises located in the services sector generated more profit than those producing and selling goods. Overall social enterprises appeared more resilient than purely commercial micro, small or medium enterprises (MSMEs) as they take a shorter time to break even, and are profitable. In fact 60 per cent of purely commercial MSMEs failed within two years of operation.

In terms of their social mission, nearly three-quarters, (73 per cent) were focused on community empowerment, 16 per cent focused on economic prosperity and 11 per cent reported their core mission as community safety and environmental stewardship. Jamaican social enterprises operate principally through retail trade (56 per cent) and arts and recreation services (26 per cent) in contrast to traditional not-for-profits that offer services in education and training (62 per cent) and social assistance (31 per cent).

A significant challenge faced by social enterprises in Jamaica, K'nife (2016) reports, is a paucity of knowledge among policy makers, which not only curbs innovation and the entrepreneurial spirit, but also fails to recognise the value and existence of social enterprises. This is manifested through inadequate and ill-considered policies that make it more expensive to establish a social enterprise, in contrast to commercial businesses, including onerous requirements which force them to prove how they intend to create social value. In misunderstanding the nature of social enterprises, policymakers passively exclude the marginalised, who seek to improve their personal circumstances and create value for their communities. This can occur through the complexity of bureaucratic processes and paperwork for those with little or no literacy or educational attainment, or the necessity in attending training and workshops at a time when women may be undertaking childcare or other domestic activities.

This thesis examines two work-integrated social enterprises (WISEs) in Jamaica that provide training and employment opportunities to those who face barriers to the traditional labour market, due to their disability, lack of educational attainments, low socio-economic

status, geographical location or gender. Their primary purpose is economic and all members participate in decision making; thus, according to Teasdale (2010), they can be deemed community businesses. The social enterprises in this study are co-operatives and are supervised by the Jamaican Department of Co-operatives and Friendly Societies (DCFS), an agency within the Ministry of Industry, Investment & Commerce, and regulated under the Co-Operative Societies Act 1950. This type of entity must have a minimum of 10 members and a steering committee from among its members. Anyone proposing to establish a co-operative is required to undertake the Department's Co-operative Management Training program.

6.2   Superior Crafts and More

Over 27,000 Jamaicans have a visual impairment (Jamaica National Building Society 2013b). People with disabilities are protected by the Disabilities Act 2014, which provides legislative support to the National Policy for Persons with Disabilities, whose main objectives are the reinforcement, promotion and acceptance of people with disabilities. However, there is a significant lack of accommodations or appropriate interventions which can help the disabled to participate in everyday life. For example, the visually impaired participant workers described the difficulties of walking up and down the stairs at the main city bus station, which have highly reflective and slippery surfaces that present 'slip and trip' hazards.

Located in the nation's capital, Kingston, Superior Crafts and More is a furniture-making, repair and craftwork WISE. Its mission is to create employment and training opportunities for the blind and visually impaired, so they can lead independent and productive lives. Operating from two porta cabins rented from the Jamaica Society for the Blind at the rear of their headquarters, they use one room as a workshop, while the other is a meeting room cum storage/display area.

This WISE employs thirteen people who are trained in a range of skills including cording, weaving and caning. They work in a cordial, friendly atmosphere and were very welcoming

to the researcher. Like most Jamaicans, they are direct, have a great sense of humour and speak their minds. With the radio playing in the background and a little tuckshop in the back corner, inside a cupboard, they also sell biscuits, chocolate, and soft drinks while they work on repairing items. They also produce custom-made furniture to order.

Superior Crafts and More was originally established by a group of blind workers who used to do caning and craft work at the Salvation Army Workshop, but were made redundant. They pooled their redundancy payments and established their own co-operative in 2007. The co-operative was taken over by the Jamaica Society for the Blind's Craft Unit, and the name Superior Crafts was registered. But after internal politics and disagreements, participants of the Craft Unit separated from the Jamaica Society for the Blind. The name was changed to Superior Crafts and More, as they decided to diversify, adding polishing and furniture-making to the existing repair business, thus adding 'and More' to their moniker.

Miss Dee is the manager of the organisation, overseeing the daily operations. As their main tenant, she is also a representative on the board of directors of the Jamaica Society for the Blind. Prior to becoming manager she was an ordinary board member, taking up her current role when the former manager was killed in a road accident. Participant workers are predominately recruited via a feeder system of the School for the Blind, and subsequently have already undergone basic training in caning provided by the Human Employment and Resource Training Trust's National Training Agency, a government-operated training entity.

Not all the participant workers are blind or visually impaired, as at least one sighted worker is still needed by the organisation. The participant workers all experience marginalisation due to their disability, or in the case of the sighted worker, limited educational attainment and an impoverished background.

Superior Crafts and More does not receive any government funding, but has been a recipient of support from JN's Social Enterprise Boost Initiative (SEBI) program, receiving

millions of Jamaican dollars' worth of training and mentoring. The organisation does not have any funds in reserves and just breaks even. It has had to obtain a loan from informal sources to purchase materials and also receive philanthropic grants. Participant workers are paid a fixed piece rate for each unit repaired or produced. The business employs participant workers who perform furniture repair and design, a supervisor, a cleaner and a manager, but lacks a business development or marketing manager to promote itself to existing and new customers. It relies on word of mouth and repeat customers. Its chief expenses are salaries and the raw materials required for caning and wickerwork, which are purchased from a supplier in America. The majority of participant workers are from impoverished backgrounds and have extremely limited employment opportunities, leaving them at risk of homelessness or being forced to beg. Whilst in the field, the researcher observed many people with disabilities including those with visual impairments, begging at road intersections and street corners in Kingston. While the participant workers had heard of the social welfare benefit Programme of Advancement through Health and Education (PATH) as outlined in Chapter 2, none of them knew how to apply for benefits and were scornful of the program.

> They _say_ that the PATH is there for us and _we_ are supposed to go on it…but I don't think it tailored for, me don't think it tailored, I don't even know _who_ the PATH tailored for….

One participant worker did not agree with the provision of benefits to the disabled and suggested that the government instead offer employment and training programs.

> For me I don't like handout, so I would not like my fellow persons with disabilities to get handouts. So what I would do if I was in government. I would try to open some skilled trade training centres, like for an example the Abilities Foundation and so. And after I would do two parts, the training part and the employment part and after you train, if you can't get anything, anywhere and through our training program we see where you try your best and you do your work and your everything and you

can't get anything anywhere else. Then I would structure it that you can come back and work for us and something. But at least some of our fellow persons with disabilities can get something to do.

Another suggested that the government offer grants to help set up businesses and speed up the process of paying out benefits to those with disabilities. But almost all agreed that if individuals received government assistance and 'wasted' the money, they should not be able to claim or access any further funds.

If I was in government what I would have done. All, I would make it, <u>is a must</u>, all the disabled person who are not in a job, they are supposed to [be] entitled to that grant to do something. One thing, if you take it and you waste it, <u>no come back</u>! Full stop. Because one somebody can't get, [and] the others get all the while.

6.2.1   Ownership, governance structure, decision-making and stakeholders

Superior Crafts and More was registered as a co-operative in October 2015 with the Department of Co-operatives and Friendly Societies (DCFS). Using the Teasdale (2010) model of social enterprises, described in section 3.3, Superior Crafts and More is a community business, as its primary purpose is economic, that is to create income, and its decision-making structure is collective, as all members own shares in the business and participate in decision making. Aside from the board of directors, there are two other committees that govern the organisation. The management committee comprises five people - the manager, president, secretary, vice president and treasurer -manages the day-to-day operations of the organisation and meets quarterly. Decisions from this committee are delegated to the manager for action. The supervisory committee consists of three people, who have overall responsibility for the supervision of the workers and the actual work received and produced. The supervisor seeks advice from this committee on any difficulty relating to the craft work or personnel. At the end of the financial year if the business earns a net profit all members receive a share. Participant workers earn a piece rate for each unit repaired or produced.

The organisation's direct stakeholders are the participant workers who may also be members of the management and supervisory committees, committee members, customers, the Jamaica Society for the Blind, as their landlord, and the JN Foundation.

6.2.2 Challenges

As with any business, start-up capital is an essential requirement, and in this case was secured from members. At Superior Crafts and More, the raw material that is used for caning and weaving is Chinese bamboo, which is stronger and more flexible than the indigenous species. Superior Crafts and More import it from an American company, and pay for the material, shipping and duties in US dollars, against which they face significant currency fluctuations. It would in fact, be cheaper to purchase the bamboo directly from the producer in China. Unfortunately Superior Crafts and More do not have any networks or contacts that could help them source a Chinese supplier direct. This is significantly hindering their development as well as having a negative impact on their cash flow. Not having access to sufficient quantities of bamboo hampers their ability to train new workers, as they are unwilling to waste bamboo needed for training, when it is required for paying furniture jobs. Consequently they are reluctant to bring in new participant workers.

Another challenge faced by Superior Crafts and More is the customer response to their pricing. The prices for goods and services at Superior Crafts and More, like any other furniture store, are fixed and not negotiable. However, they have found that their more affluent customers do not wish to pay the prices charged. These customers perceive that because Superior Crafts and More is a social enterprise, managed and operated by workers with a disability, they have the right to dictate the price they are willing to pay, which like alms, should be gratefully accepted by the participant workers.

> *What surprised me most, sometimes a customer may come in, right, and they*
>
> *come in with a job. And I tell you why it surprise me, because when they come in I*
>
> *don't know, maybe to them, blind people don't spend money. They cry down price,*
>
> *and if you look at what we're doing over there and the time we have to be on it. Yes*

we going to charge them a figure, they want to use for them, their figure, like they want for tell us how much they can pay.

It's always the big men who bawl. The lawyers and the doctors. And the politicians.

Yes, me see a lady bringing a Planters [chair] here. A lady, her car (stretches arms wide apart) nearly big like in here so, you know say she have money. She come in and when she hear the price of the Planters, she just take it [pick it up] and go back away [and leave]. She just feel like say, through, just feel like say, through them feel say blind people around here…We don't know…them no know money, so everything [should be a] cheap [price].

Although you doing their work for them, but them just look at you like you're stupid. Or you no have function, no man, sometimes them a talk…

… and them talk disrespectfully.

Because of some of these customers when they come, it's like they look down upon on you in a way.

Some real people, people that are really, come like them really no believe say, that our time is not value.

(Sarcastically) [Like] Blind people no need money!

We no need money!

As discussed in Chapter 2, Jamaica has high wealth inequality, which is witnessed by the marginalised as extravagant consumption by urban elites (Tindigarukayo 2014), as evinced by the reference to the customer's large car and occupations of politicians, lawyers and doctors. Despite the fact that people with disabilities have been entitled to the same minimum wage as the able-bodied since the 1970s, it is clear they still face prejudice and discrimination. Arguably, if the participant workers were in a mainstream store, and did not have a disability, their pricing would not be so disrespected and questioned. Furthermore, the participant workers also encounter contempt from customers, who believe that because they are disabled they have limited intellectual capacity. However,

not all customers are mean-spirited, and some generously tip or give the participant workers gifts in addition to paying for their work.

A lady just came in and just give everybody a $1000.

And she also bring us a nice wine.

It was a good gesture, it was a kind gesture.

And you have customers from time to time, when you do them work. They give you a little tip.

One did give us chicken.

One next one did bring patties and share us some. So we have some good customers as well.

Figure.11: The caning process

Strand or hand caning uses individual strands of bamboo cane, through holes drilled in the perimeter of the seat, woven in a seven-step pattern. While time-consuming, it is the strongest and most durable form of weaving.

Images top left to right
Step 4 of the caning process.
Abby shows her caning skills.
A close up of step 2.
(Source: Erica Myers-Davis)

"I really, I love caning…I love the fifth and sixth stages, fourth stage is the hardest and I don't really love that part.
But the fifth and sixth, yeah I love it. As what happens, our job takes seven stages to complete each job." Abby

"For me I like the fourth stage which they say it is the hardest part of the work. But I like doing that". Miss Wickham

Figure 12 The raw material, bamboo that is used for caning, in front of a wicker

basket made by Mr Mead

(Source: Erica Myers-Davis)

Figure 13 Finished products

Left: Coloured Danish Modern Corded chairs

Centre: Spline cane seat which uses machine woven cane.

Right: Coloured Checkerboard Woven Chair

(Source: Erica Myers-Davis)

6.3 Cockpit Treats

Trelawny is Jamaica's fifth largest parish, located in its northwest, with a population of approximately 75,000 people. Cockpit Country, which is uninhabitable, is located in its southern section and is a natural reserve for indigenous flora and fauna. It is a hilly and dense area with limestone denudations, its terrain is reminiscent of the shape of cock fighting dens, known locally as 'cockpits'.

Trelawny is dependent on agriculture and has nearly eight per cent of national farm land. Historically it has always had an agricultural focus, as much of its land fell within the "sugar belt", making it the wealthiest parish in Jamaica during the Georgian era. Over the last twenty years there has been a shift towards yam cultivation, producing the crop for both export and domestic consumption (Constable 2015).

Originally brought over with the slaves, yam is an important staple in the Jamaican diet and Trelawny yam in particular has mythic status. When the researcher's cousin, elite athlete Usain Bolt, stunned the world with gold medal wins at the 2008 Olympic Games, his father credited his speed to a lifelong consumption of Trelawny yam. The researcher's family is from the heart of Trelawny yam country. Yam is viewed as a food which not only nourishes but also gives power and stamina (Beckford, Campbell & Barker 2011) and Trelawny yam is a source of immense pride. Trelawny produces 40 per cent of the island's yams (Constable 2015).

Ulster Spring is a tiny settlement in Trelawny which was originally established as a 1,550-acre sugar estate in the early 1800s. With a population of little more than 1,200 people, there is high unemployment, and more female than male residents living in the community. In particular, there are a significant number of older women (age 50 years plus) in the community as younger women have migrated to the cities of Montego Bay or Kingston to find employment. Previously it was a bustling and thriving community but over the last three decades, various services have gradually moved to Albert Town, a larger community about twice the size and four kilometres to the south west. Now the only significant public

buildings remaining are the police station, court house (built in 1893) and Baptist church (built in 1897), and the previously separate basic (infant) and primary schools have had to merge.

Cockpit Treats is a rural-based organisation that supports poor women through agro-processing projects. Cockpit Treat's mission is to create employment and training opportunities for local women through the production and wholesale of food and beverages such as punch, wine, cake, puddings, ice cream, buns, and pizza base made from locally grown yam. Cockpit Treats emerged from a women's group which was started in 1997 through a government agency Rural Agricultural Development Authority (RADA) rural women's empowerment program. A RADA extension officer brought local women together as the Ulster Spring RADA Women's Group and taught them skills within culinary arts, home economics, gardening, home management and needlework. The goals of the program were to empower rural women to be better homemakers, to help improve their homes and communities and to prevent food insecurity by using local produce, especially wild fruit and vegetables, rather than letting them go to waste. Other aims were to help them to stay in their communities, and set up sustainable enterprises using local resources and to reduce rural-urban migration. With the support of the extension officer, the group entered a variety of food competitions and agricultural fairs, where they won numerous prizes, trophies and medals. Some years later they renamed themselves the Ulster Spring Women's Group as the members took ownership of the group and managed themselves, organising community projects to solve unmet needs, as the women now see their group as the cornerstone of the Ulster Spring community. Being socially-minded and compassionate is an essential part of participating in the group. A few days before the researcher arrived to conduct the interviews, they had organised a community clean-up in an attempt to kill potential mosquito breeding grounds, as the Zika virus had recently arrived on the island. Indeed the women go to extraordinary lengths to serve their community; they donate their labour and produce to provide meals for ill and housebound residents and regularly scrub down and sterilise the cells at the local police station.

Argubly, these jobs are the responsibilty of government, and certainly outside their remit, but these women know the government can ill afford to take care of its citizens. They want a clean, harmonious community for their families so they organise themselves to take action.

Figure 14: Piles of collected rubbish from the community clean up outside a derelict store

(Source: Erica Myers-Davis)

Community intervention by participant workers was substantiated by academic Dr K'nife who stated:

> *When community people buy into an idea because, from them it emerge from,*
> *them don't have no problems, nobody no thief nothing, nobody never do anything*
> *like that.. Once your mission is to support your community, people protect those*
> *things. And that is why if you're building a school in a community like a prep school*
> *you don't have to pay no labour, because people in the community come volunteer.*
> *And do the work themselves. They call it 'day-for-day' in Jamaica. You understand*

> *what I mean? And all you have to do is make sure people have something to eat*
>
> *and then cook [for them].*

Harriet Fels, the retired director from RADA, also confirmed that in her experience the establishment of rural women's groups instilled a sense of community cohesion, amongst the participants who would create their own interventions:

> *They would help each other. If one had a funeral[4] in the community, the others*
>
> *would help the families, provide meat.*

In fact the smooth functioning of communities can create not just commitment, but outright loyalty and power to those who serve them, as Dr Johnson revealed when discussing the impact of criminal Don Christopher 'Dudus' Coke, who had provided essential social services in his community:

> *A community put their power against the state and became very loyal to the*
>
> *alternative authority. The people took a flight from the state, they were no longer*
>
> *loyal to a state that couldn't provide for them. They became loyal to an alternate*
>
> *criminal authority who had created a system of social service. Even though that*
>
> *service was being provided in an atmosphere of fear and lot of them were*
>
> *genuinely affectionate to Dudus, but they were also in a community where they had*
>
> *to.*

In 2012 the Ulster Springs Women's Group were informed of the JN Foundation SEBI program that could transform their community group into a social enterprise. They applied for membership and were successful in joining the program. To date they have undertaken extensive training and capacity building in business management, food processing and product development. Through the program they have had access to the Scientific Research Council (SRC) who have helped them to standardise their recipes, create flour from the yam and meet food safety standards. The group came up with the name Cockpit

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[4] At Jamaican funerals, the bereaved family is expected to provide a hot meal to all guests. Funerals are typically all-day affairs with hundreds of people in attendance.

Treats in reference to their location and as part of their business planning process, with a view to registering their entity as a cooperative.

Members have invested their own money into the WISE. The bulk of their expenses are for materials needed to make sample products and for purchase of raw ingredients.

> *Most of the stuff go out [money is spent on] in samplings. And although people are, you know they seem to be interested and…so you keep on putting out and you're not getting stuff [orders], so you're not growing…The truth is, people want to come and taste and enjoy it and so, but they're unwilling to pay. We try to keep the price as reasonable as possible.*

Participant workers are typically paid between J$1,500 and J$2,000 for a day's work, depending on the revenue generated from sales.

6.3.1 Ownership, governance structure, decision making and stakeholders

Ulster Spring Women's Group has a governing committee which includes the president, vice-president, secretary, treasurer and public relations officer. Cockpit Treats will retain the same structure once formally registered. Its primary purpose is economic, and like Superior Crafts and More it is a community business as it has a collective decision-making structure. All 20 members own shares in the business and participate in decision making. Members will receive a share of net profits, while participant workers are paid for any jobs they undertake. Currently the organisation's key stakeholders are the participant workers who may also be members of the board or officers, customers, farmers, SRC, RADA and the JN Foundation. In order to join the organisation, a prospective member must live in the local community, have an interest in baking, volunteer in local community activities and exhibit a willingness to learn.

6.3.2 Challenges

As discussed earlier in this chapter (section 6.1), there is currently no policy framework in place for social enterprises in Jamaica and they can choose any legal form they wish.

Cockpit Treats, like Superior Crafts and More, has chosen to be registered as a cooperative, which means that members are able to share in profits, but this means they are ineligible for the many tax exemptions that traditional not-for-profits and charities receive, although both are supervised by the same government department. This, in turn, highlights an institutional barrier faced by Cockpit Treats, through the complex bureaucracy and politics of trying to register their cooperative with the DFCS. The social enterprise had been operating from a member's home, but at the time of the interviews the DCFS had refused to register their social enterprise as a cooperative after the mandatory workplace inspection. They advised that as it was based in a member's home, the kitchen needed to be physically separated from the rest of the house, as the washroom (bathroom) is located in the room next door and her family to need access it. The member told her local church minister, who allowed them to use the Manse, which had an unused training kitchen. Unfortunately, due to local politics within the church, a parishioner complained and the use of the kitchen had to be approved by the church council. The minister was overruled by the church council who did not approve the use of the training kitchen for the women. The minister appealed the decision and escalated it to the Synod in Kingston, who will arbitrate the final decision. The women are in limbo until a decision is made, and are unable to lobby Synod directly to influence the vote. Their only alternative, should the vote not go in their favour, is to use the former Public Works office in the main street in the community, which is a dilapidated and derelict building and would require substantive capital works to bring it up to standard as well as an extensive catering kitchen fitout. But the bottom line is that until they have approved business premises, Cockpit Treats is unable to be registered as a cooperative, which makes them also ineligible to apply for any philanthropic funding. While it has been a very disheartening experience for the women, they remain optimistic. This dispute reflects Jamaican style clientelistic politics which was discussed in Chapter 2 and the power imbalance and the burdensome bureaucracy experienced by the women.

Figure 15 Trelawny Yam and Cockpit Treat products

"Well you get mostly the yellow yam and you have two species of yellow yam. You have the black wisp and you have the round leaf. The black wisp is the milder variety… it is also dry but it…have a milder texture. The round leaf it is, when it is fairly ripe it is hard and very dry. When you talk about the good Trelawny yam, you talking mainly of the round leaf. Both of them can do whatever we are doing, but the black wisp when you're making the pizza or anything…you have to use as a dough.

The black wisp is the better one…for cakes and puddings and buns and things like those drinks, yam punch or whatever, we use the round leaf."

Victoria Milne

Image: Top: Trelawny Yam. Middle: Cake and Punch made from yam, Bottom: Pudding and Wine made from yam.The raw yam is first dehydrated and made into a flour and then can be used to make a variety of products.
(Source: Erica Myers-Davis, Gleaner Newspaper, Cockpit Treats)

6.4 Factors influencing participant workers

Broadly speaking, from the themes that emerged from the two cases, participant workers experience improved social inclusion and quality of work life through access, participation and empowerment.

6.4.1 Conceptual Picture of Access to Social Inclusion and Quality of Work Life

Participant workers gained access to social inclusion and quality of work life through their wages, job requirements and accommodations and their overall financial wellbeing (table 5).

Table 5: Outcomes of the dimension of access in the APE model

Access	Superior Crafts and More	Cockpit Treats
Earnings	*-Piece rate; not a regular salary* *-Access to profit share*	*-Casual rate; not a regular salary* *-Access to profit share*
Job requirements	*-Need a basic knowledge of caning prior to joining.* *-Further training provided on the job.*	*-No skills required.* *-Baking and cooking skills learnt on the job.*
Job accommodations	*-Workshop meets mobility and access needs of the visually impaired.*	*-Hours are flexible to meet childcare needs.* *-Is situated in local community, no travel required.*
Financial wellbeing – ability to afford essential items, manage debt, capacity to save or own assets	*-Ability to choose whether to save or spend.* *-Being able to contribute financially* *-Access to informal savings scheme (Pardna Plan)* *-Ability to pay tax and contribute to national economy.*	*-Financial independence.* *-Being able to contribute and look after your family.*
Organisational effectiveness	*Business skills and management training*	*Business skills and management training*

6.4.1.1 Earnings

Participant workers were able to earn an income, although it was paid as a piece rate or casual rate rather than as a fixed salary. The social enterprise, through paid employment, creates opportunities for increased financial participation and inclusion. For instance, the disabled workers discussed the pressure of being adults still living at home with their parents who could not afford to keep them.

> *Well if I wasn't here, probably I would be at my parents, depending on them and let us be fair. When you reach certain age, sometimes the parents will tell you 'you reach certain age now, go look work and do what or whatever' and sometimes you within yourself, don't feel like you reach certain age, you must [be putting on] pressure the parents, especially if they are up in age and they are just getting their little pension.*

6.4.1.2 Job Requirements and Accommodations

At Superior Crafts and More, repair work was expected to be completed in a timely fashion and the participant workers needed to be appropriately trained. Participant workers had completed a basic caning course prior to starting work there. At Cockpit Treats, no baking skills were required upfront as participants would be trained on the job; just enthusiasm and willingness to learn were the key requirements. Both social enterprises had collegial and convivial atmospheres, with friendly interaction between workers and managers.

Job accommodations for the blind and visually impaired participant workers principally involved ensuring that they could navigate their way through the building and spaces without obstructions. While they worked standard business hours like other businesses and government offices in Jamaica (Monday to Fridays 8.30am to 5.00pm), if participant workers required time to attend personal appointments there was flexibility in their work schedules to cater for those events.For the women of Cockpit Treats, their main

accommodations involved being close to home (they typically lived within walking distance) and the ability to work flexible hours to facilitate childcare, school and household activities. Babies and young children could also be brought along if workers needed to attend meetings.

6.4.1.3   Financial Wellbeing

Financial wellbeing for participant workers was experienced as gaining financial independence and choice through economic inclusion, and the ability to contribute, save and look after their family.

> *It's make me more a woman. Yes I'm an independent woman. At the ending of the week, or the ending of whenever, don't care how small it is, I can carry it home and say yes this is mine, I worked it.*

> *For me it makes a big difference. Sitting at home, yes my husband is giving me things. I need my own money that I can do whatever I please to do with it. If I choose to save it all, I can. If I choose to spend it all on myself, I can. So it makes a big difference for me working here, at the end of the week, it's mine.*

> *"Miss Bain have her little Poor Man Pardna[5], I joined that little Pardna and if you ever see how a great deal it do for me, during back to school time to go to the bookstore and so. Because if I wait on those persons, whether JLP or PNP if you wait on them, you die of hunger and is the truth.*

In addition to enjoying the independence of having their own money, the participant workers also stated that being able to contribute to their households was a critical part of feeling financially included.

> *Well it's made some difference because this work almost, school my daughter. I send her through college and high school and most things.*

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[5] A Partner Plan is a traditional Jamaican informal saving scheme, popular with the unbanked, in which each depositor or 'partner' invests an equal amount of money each week 'a hand' into a pool, controlled by a 'banker' who collects the combined totals of the contributions and pays out in turn the pool sum or 'draw'.

Well it makes a difference 'cos I help to contribute to whatever is needed.

The manager of Superior Crafts also articulated the importance of the ability to contribute on a national level:

They are contributing, 'cos when they go to the shops or the stores, whatever they purchase, GCT[6] is in it, they are paying it just the same. So they are contributing. It's not like they're saying, they're disabled and so they're not paying this or not paying that. The only thing you don't get [pay] is income tax. But they have to pay all the other taxes. And then if you have a job and you're earning that way you are making a contribution to your country too. 'Cos your dollar adds up to whatever they're collecting.

6.4.1.4 Organisational Effectiveness

The training provided through the JN Foundation's SEBI program had a massive impact on the effectiveness of each social enterprise. Prior to the training, participant workers admitted that they had very little knowledge or experience in running a business. Whereas the participant workers at Superior Crafts and More were expert in caning and weaving and required no technical assistance, the team at Cockpit Treats did require assistance to create their products. They received training in how to standardise their products, how to ensure consistency in their production batches and how to scale up domestic recipes to commercial levels. As Mr Blake from the SRC explains:

[We taught them] food processing and food processing techniques, juice processing, sauce making, canning, jams and jelly making…the actual processing of the raw materials into finished products…We were actually giving them more information, details, in how technically, things should be produced…it made them more equipped now, to do better quality. To be able to do bigger volumes and of course and have consistency in their formulations. What we did there, was to show

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[6] Goods and Consumption Tax

them how they would formulate…Because a lot of them, or most, if not all, when they're doing their products. They go by, a cup of this, and teaspoon like that. Just how you do in your kitchen. And when you're going into production, you need to step from there up a bit and you need to talk about grams and kilograms and so on. So I was showing how you can convert now, from what they're doing into a formulation. And how, and then get percentages, and show them from the percentages how you can scale up to any quantity that you want. So you might do something like, something might be 10kgs and then you scale up to a 100kgs and more.

For the Cockpit Treat participant workers, the training was a boon, which has resulted in creating better efficiencies for their organisations and increasing their ambition.

And the training helped me like, sometimes you know you make one budget and wonder how it going to work, yet still you can try to fix it to work you know. The training really helped.

Yeah, there was a lot of training. I recently participated in some training and commercial food production. It was done; the practical side was done Scientific Research Council. We did, like, batch sizing and testing, we did canning, packaging and labelling laws. So we canned ackee, we did juices, syrups, sauces, jellies and jams, quite a bit of stuff.

We got training how to make the, how to write to sponsors to get money.

As you go to these training you learn to do things <u>properly</u>. It teach us, teaches us how to run a business, because we did not have a business class [training and experience].

But we have not yet reached the shelf, the supermarket, which is where we want to go.

This is also echoed by the participant workers at Superior Crafts and More.

We never know anything about business really, fully.

Until we, until SEBI started, until we started being on the SBI program.

We never know about accounting, never know about…our business we were just like working and when we finish that task, we just collect what we earn and we just make a note and put it in book that we work and we collect.

We never had a business plan; we never knew anything about business any at all. We must admit that. The SEBI program has stepped us, stepped us vastly.

Saffrey Brown from the JN Foundation, who developed SEBI, reinforced the impact of the training.

They've just become business people… Superior Crafts and More, would be a successful social enterprise… they have, have been able to hire more people. They have been able to increase the wages of their people. They have been able to increase their customer base.

But on the other hand, Saffrey also believed that some of the training provided was perhaps too sophisticated and formalised for grassroots organisations like Cockpit Treats.

…Ulster Spring Women's Group which is a very, very grassroots organisation. They can't make that much use of a business plan, right…So in the next phase if we come across… a group like Ulster Springs again, we not going to sit down and make them, work with them for three months to develop this big sophisticated business plan. What we might do is an implementation strategy plan or action plan. Get down to a certain stage, and then if they manage to get there and they're doing well, then you'll say ok listen maybe now it's time but they've learnt some basics... Ulster Springs doesn't need a business plan. You know, they got a projection some inputs, markets, a little branding, you know and equipment needs. I mean, you know they don't need SWOT analysis and the market research, they want to sell in their community...They want to do yam pizza on a Friday evening and they want to sell, you know a certain number of things to the local and surrounding communities.

What's going on in Kingston doesn't matter to them. So why am I, why am I

focusing on researching what's going on in Kingston, you know what I mean?

6.4.2   Conceptual Picture of Participation

Using the lens of participation from the APE model, social inclusion and quality of work life here is focused on their degree of participation and decision making (table 6). In other words, the prime features are the cordiality of their relationships with their co-workers, the ability to participate in decisions affecting their work and the organisation, their engagement outside the workplace with family, friends and participation in civic, leisure and community activities and the impact that work has on its participant workers.

Table 6 Outcomes of the dimension of participation in the APE model

Participation	Superior Crafts and More	Cockpit Treats
Relationships with colleagues	*-Opportunity to interact with other blind people.* *-Friendship with workers.*	*-Volunteering together on projects.*
Decision making at work	*-All members have a say and a vote.* *- Members can participate in governance committees.*	*-All members have a say and a vote*
Social wellbeing – engagement with family, friends, society **Participation in civic, leisure and community activities**	*-Participating and interacting with others.* *-Improved relationships with family* *-Helping each other.* *-Ability to socialise with other blind people at social events.*	*-Social interaction.* *-Looking after family.*
Impact of Work on Workers	*-A welcome distraction that can take your mind off your worries.*	*-Some women need paid work and not volunteer work.*

6.4.2.1   Relationships with Stakeholders

Relationships with their peers appeared to be a valuable and important aspect of participant workers' sense of inclusion and quality of work life. The researcher observed warm relationships between the participant workers, a sense that they cared for each other and even at times, a family atmosphere. In fact the participant workers at Cockpit Treats spent time meeting and undertaking voluntary activities together to help the community, and the Superior Crafts and More participant workers admitted that even if there were no work available they would still come and spend time at the workshop to be with their friends.

> *Sometimes the work is not going on here, no work. I'm not supposed to come to work. I get up in the morning, I leave and reach down here. The boss say 'no work no go on'. You dedicate yourself to here, you know… if you here…you just stand up there and listen out. Sometimes you feel like, who want to fight? But you just fun, you know, you just have fun.*

For those undergoing personal difficulties, their co-workers provided a friendly, supportive ear.

> *The friendship, the friendship, from each worker. The support from each worker. Like, I might be going through something, and I come and I discuss it like with Miss Bain or probably… Bettina… The support that is given, you know makes you feel welcoming, make you feel like you're at home.*

6.4.2.2   Decision Making

Both social enterprises were formed as cooperatives, so the participant workers were also members, and all members have equal representation, in all aspects of governance and decision making. Superior Crafts and More had even established two committees (management and supervisory committees), which enabled members to directly participate

and contribute to the overall management and governance of the organisation. Cockpit Treats had one governance committee, in which all could participate.

6.4.2.3   Social Wellbeing

Social wellbeing considers the participant workers' participation in formal and informal social activities. Through the SEBI program they were able to participate in public life, and were exposed to business and civic activities. For example, they attended and participated in trade fairs and exhibitions which were attended by diplomats, government officials, potential buyers and other corporate figures .

> *…you get an opportunity to become, to be exposed. We went…to seminars, we went to workshops, we get an opportunity to go to the Summit and we went to the Diaspora Conference in Montego Bay. We were given the privilege of being there…and it was fun. So you know it really gives you an opportunity of, you know, having encounter with another persons, you go out to be exposed. It opens your eyes to a whole heap of new things.*

The manager of Cockpit Treats also concurred as she explained that:

> *They invited us to do some of our products, of course they paid us…and we take them there, the British High Commissioner, Jamaican High Commissioner to England, Aloun Assamba she was there.*

In addition, with their involvement in SEBI they gave several media interviews, made promotional videos and undertook business and product training. The training in particular had a very positive impact, not just in developing skills, but also in building confidence.

> *I didn't know that I could be the supervisor of a Peace Corps [volunteer].*

Even the act of staying overnight in a hotel was an experience that was previously unattainable for some participant workers.

> *We have gone to business mingle [networking events], we have gone to hotels, I mean, me no have no money to go hotel, you know darling.*

For those participant workers with disabilities, being involved with the social enterprise enabled them to socialise with other visually impaired and blind people, not just in the workplace, but also at events that were hosted by the manager and other blind groups. These events presented an opportunity to meet up with past pupils from the School for the Blind, as well as new people.

> *For me now, being here [I get to] interact with other persons, other blind and visually impaired persons, not only sighted persons. But people who have been at the School for the Blind before…you get to go to events that people are putting on…you hear about their socials, you go. Even not only the events that the various organisation within this little circle, but you sometimes you hear another blind person come, you know say, a little 'old hits' party, a down the road and you go to that 'old hits' party and you meet more people.*

Family life and relationships were of the utmost importance to participant workers. The women of Cockpit Treats painted a bleak picture of family breakdown and distress for those women in their community who had to leave to find work as helpers in the cities[7]. Their children are at risk of maltreatment or neglect, their partners may leave them or stray into infidelity and their meagre earnings are spent on travel and doctors' fees with little left to save.

> *When I see Angela gone to look work and the kids are by [living with] the grandparents and I'm telling you that little girl, is one of the prettiest little child, you could ever look on. The child have a pretty skin. And Sunday when the child come to church they had was to send her back home because I don't know if it's the 'hand and mouth'. Right. But the grandparents have this child and the child mismanage, and the entire two leg you know, the child two legs, sore up and the*

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[7] According to the Jamaica Household Workers Association, over one third of Jamaican working class women work in domestic service and represent the largest single group of working women. Known colloquially as 'helpers', they are employed in private homes as housekeepers, nannies, cleaners and maids. Women from the country typically work in residential, live in roles, with one weekend per fortnight unpaid leave and earn around J$6,000 per week. The cost of public transport to take the 90km trip from Kingston to Ulster Spring would be approximately J$1,800 (one way). The National Minimum Wage (2016) is J$6,200 per week.

hand them you know…Right. So if she [the mother] was here that wouldn't happen
to her child…Because she's out there working, taking care of somebody else's
children and her children... Right, so this is what we are saying. You understand?
And this is just the same way you lose the husband too, because you out there,
and he is here. For two months, three months he say "me no gone wait on you to
come down once a week" and maybe when you come down that weekend you
have your period you know, is a reality to it, you understand? And you have to go
back to work. So you lose your husband just as, just the same way… Because
you're out there working and yes you'll be getting a little money over that, but when
you come home. Where's the value? You have to pay how many money, fare from
Kingston or from Montego Bay to reach here. That's the first thing and when you
come around, your child is craven up [sick] and run go hospital and maybe to a
private doctor – a $4- 5,000. How much is it you save from that two weeks' salary.
You no save anything. A month is it you save. You don't save anything. You don't
save anything.

The idea of young rural women leaving their families and migrating to the cities for work,
appeared to be a relatively recent phenomenon for Marie Silverman, the oldest participant
in Cockpit Treats. Now in her 70s, she reflected that in her day, she was not allowed to
leave the Ulster Spring community to study in the capital.

I wanted to be a nurse but instead of that I got married. My husband said 'no'
because I would have to be living away from him. I would have to be on campus.
So it was 'no', but now it's not like that.

6.4.2.4   Impact of Work on the Participant Workers

Any concern about the impact of the work on participant workers was seen largely in terms
of the accommodations that were made for them. Participant workers were not greatly
concerned about the impact of their work on themselves. For the women of Cockpit Treats,
the manager understood that some women could not join them to do unpaid voluntary

work, because they were desperate for money and needed paid work. On the other hand, the participant workers at Superior Crafts and More felt that all work should be completed as requested, and that if there were a problem it was to be taken to the supervisor to resolve. If fact they saw the work itself as a welcoming distraction if they were experiencing any personal problems.

> *So even if you're here and you don't even get money, or you're even getting money until your task is finished. You, when you're here, you don't get the time to really worry because we talk, we joke, you know, we enjoy each other's company.*

6.4.3   Conceptual Picture of Empowerment

As discussed in Chapter 4, the final dimension of the APE model examines social inclusion and quality of work life through the lens of empowerment (table 7). Whereas access and participation considered the neoliberal and social justice motives of social enterprise, empowerment explores the human potential factors of social inclusion and quality of work life.

Table 7: Outcomes of the dimension of empowerment in the APE model

Empowerment	Superior Crafts and More	Cockpit Treats
Hope – long term planning	*-Ability to move from ignorance to knowledge through training enables personal development and growth.*	*-Not having to migrate to the city, can plan to stay at home with family.* *-Ability to move from ignorance to knowledge through training enables personal development and growth.*
Voices being heard by, listened to and engaged with exclusionary agents	*-Standing up to prejudice and aggression.*	*-Not being dependent on the men, running their own business.* *-Access to government and officials through SEBI.*
Emotional wellbeing – feelings of safety, empowerment, belonging, happiness	*-Self-reliance.* *-Enlightenment.* *-Collective security.* *-Sense of pride and*	*-Self-reliance.* *-Collective security.* *-Living a violence-free life*

Empowerment	Superior Crafts and More	Cockpit Treats
and life satisfaction	*belonging.* *-Being a better parent. .*	
Impact of work on the community	*-Community intervention strategy.* *-Ability to move from poverty to wealth creation.*	*-Community intervention strategy.* *-Ability to move from poverty to wealth creation.*

6.4.3.1   Hope

The notion of hope considers the participant workers' ability to plan and envision a better future for themselves, as they move from a state of powerlessness to being empowered. As previously discussed under the heading of access and organisational effectiveness in section 6.4.1.4, the training undertaken with SEBI not only increased their knowledge of managing a business and technical capabilities, but also raised their overall confidence and self-esteem. As a result they experienced deep personal development and growth as they moved from ignorance to knowledge, which is reflected through their relationships with their children.

> *But since being on the program I have now realised that sometimes I used to rough, I used to talk rough to my son, in a certain way. Like real rough him. I'm going to be honest with you, since I started being on the program, it has given me a different way; it has shown me a different way somewhat to deal with those kind of situations. And now we get along very well.*
>
> *I used to be very rough at my daughter as well, for more reasons than one. But now that I have been in our business, I've been in the SEBI and with the support of other persons around me (…) and so and I try my best not to rough her, not to slap her…If I realise that she doing something that is quite annoying, instead of, I rough her or I slap her, I tell her something that she don't like to hear. Like I tell her, that 'I'm going to sell her'… Or I tell her that if I promise her something, I tell [her] 'alright I'm not going to give you that thing again'.*

The manager of Cockpit Treats asserted that if local women had an opportunity to work at the social enterprise, it would enable them to plan and have a vision of a stable future living together and keeping their families intact.

> *I must be honest, a J$1,000 have no use in Jamaica now. But I'm telling you if these ladies can leave their house and come and work [at the social enterprise] for even a four or five hours and get a thousand dollars, you know, honestly you know. They would be so willing to stay there with their family [and not migrate to the cities]. Because family come first you know.*

All participant workers recognised and took pride in their improved skills and newfound knowhow, despite their limited earnings, as expressed by the women from Cockpit Treats:

> *The personal development that we have gained from these trainings I am able to, we are able to manage a business. Like I said we have not done a lot of sales. I am able to talk to people I am able to tell you what we want to do. I am proud of what we are doing, from where we have come from to where we are now, alright…There was a time when, this is just a rural community, is not everybody really to be up and about and know how to talk and whatever. You develop confidence, you become confident, you develop confidence, alright.*

6.4.3.2   Voices Being Heard

Under the empowerment lens, 'voices being heard' is more than just speaking up and having a say. It involves engagement with exclusionary agents, self-representation and seeking to shift power imbalances, as evinced by Superior Crafts and More which empowers participant workers to stand up for themselves and resist oppression. As Saffrey Brown articulates, it's significant that they don't reduce prices to those who try to haggle and downgrade the value of their work.

> *They, they no longer apologise I mean Superior Crafts and More, which restores the most beautiful antique furniture, no longer apologises when you ask them the*

> *price and they tell you it's J$60,000, you know. They no longer, 'cut down', 'cut down', 'cut down' (uses hand to make chopping motion) and take what you give them…*

Mr Mead, the only sighted participant worker, recounted his experiences when he came across a man intimidating a visually impaired stranger in the street, and decried the lack of courtesy displayed on public transport for disabled people. Mr Mead made his voice heard by those exhibiting exclusionary and discriminatory behaviour.

> *A guy up there was selling [sugar] cane and thing. So the blind [man] lick up in [bumped into] the man and the man go say, "Who come here so, go a your yard [home] and come up on [off] the road and [when] you can't see!" Me [a] stranger, across the road and me a say to him, say, "leave them alone" and come like the whole bus stop and the place, take him on, you know.*

> *But the bus, the bus is an issue nowadays. You see when the bus full, they hard to get up, to get the blind people them. When she [Abby] was going on the bus one day, and when she going on the bus, everybody sit down so. They no give her [a seat], [nor] ask her [if she'd like to sit], me have to go on there and curse (he speaks loudly) and make bare noise and tell the driver say, "<u>if anything wrong with her, a him I hold responsible for her</u>" (he gesticulates) so they give her a seat.*

The participant workers of Cockpit Treats had engaged with exclusionary agents since their commencement as a women's group established by government agency RADA. In fact, two members had previously been employed by government agencies in Jamaica and the UK; they knew how to engage with their local member of parliament, the church council and parish council in a bid to resolve their work premises issue, and had the confidence to do so.

Both social enterprises had met with government officials through the business networking events organised by the JN Foundation, but the participant workers had not taken any further action in terms of trying to secure government support of their work. The researcher

considered those meetings as participation activities rather than evidence of empowerment. While their voices may have been heard, there was no transformative action that occurred to change the structural exclusion they experience, such as policy changes to make it easier to register a social enterprise.

6.4.3.3   Emotional Wellbeing

Gaining independence through earning their own money, as described previously in section 6.4.2, underscores a resistance to gender-based violence and oppression. This notion of independence was a repeated theme expressed by the women of Cockpit Treats, who did not want to rely on partners who often had little money themselves, and lived under a threat of potential violence.

> *I should say sadly that cause a marriage break up recently, because this young lady she is a member of the group but she have to leave to go to work [in Kingston] and the husband cannot take that and woman want money, no true? We want we little money. And the men need to understand also, because it's not every day you're really going to have it [money] to give the wife, so [she] left and gone out to work and the man, always a quarrel and a quarrel… The man alone, have to be finding some [money], is not a pretty life, sometimes, the men beat them. Men get angry when them can't give them woman money. No true? Some of them.*

Indeed this is supported by Dr K'nife who asserts that resistance, self-reliance and collective security are at the core of Jamaican social enterprises and references revolutionaries such as Bedward, Garvey and Haile Selassie who promoted those concepts.

> *And if you really look at the model, the lens of the ancient people you will start to see social entrepreneurial from enslavement until now. When people burn plantations they were trying to improve them quality of life, them took a calculated risk went up to a place to create an independent source and that is how the*

peasantry emerged. From that we saw the Free Village Movement[8] that copied that

approach and utilised it and it come straight down to grooves etc., you know. So,

the history of Caribbean people and 'Caribbeanness' really reflects a social

enterprise dynamic in terms of how do we improve the quality of lives of our people,

whether at the community level or the national level.

While both social enterprises were struggling financially, it was evident that the participant

workers had gained new skills and experiences that improved their interpersonal

relationships and emotional wellbeing. Being part of the enterprise gave them a sense of

belonging, of pride and, importantly, of purpose. As the manager of Superior Crafts and

More confirmed:

It keeps them in attendance, they have a sense of purpose, instead of sitting at

home even though the money is not big, it gives them a sense of belonging and a

sense of pride, when they know they can get up in the morning and put on their

clothes and say I'm going to work.

6.4.3.4   Impact of work on the community

In his interview Dr K'nife argued that social enterprises should be viewed as wealth-

creation vehicles rather than poverty-alleviation strategies, which runs counter to the

current discourse on social enterprises. In his view poverty reduction does not improve

quality of life:

Because these poverty-reduction programs are not about improving people's

quality of life, they are about getting people… above the poverty line, which don't

mean say you're better off, it just means that you're less poor and thing, you know.

And you still have the frustration and all those things.

Dr K'nife viewed social enterprises as sustainable intervention strategies that could, and

should, be delivered by communities for themselves. Significantly, the two chosen

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[8] Described in chapter two, section 2.3.1.

enterprises were not established by a single person or founder but by specific communities, as a response to their unmet needs. Hence, Cockpit Treats, as previously described, emerged from the Ulster Spring RADA Women's Group, and Superior Crafts and More was established by former workers, as explained by Miss Webb:

We know our needs, you know. Nobody out there is willing to cater to us, we have to try and make employment for ourselves. And that's what happened, how this thing started, you know, those persons used to work for the Salvation Army. That business closed down and they didn't just go home and sit down. They pool their resources together and decided to start something. They created employment, instead of trying to go and find employment.

Cockpit Treats has consciously positioned itself as a community intervention strategy which has a significant local and national impact, as outlined by participant worker Cassandra Kendall:

And we could even look at crime, which this [social enterprises] would help [reduce] crime. Because you have two boys and leave these two boys to go Kingston go work. Who supervise these boys? Somebody else look at them in the evening make sure they go in and close the door. Who watch them? Who supervise the television that they are going to watch? Who supervise their homework? Nobody can do it [the same] as a parent. So if you can really get ladies to stay in the community and work and this group… [because] when I have to leave this community and I have to go to Montego Bay to work I come in once every two weeks and that time my family is going down. I'm losing my husband, losing my children. Okay? So we are saying that if we could really get this up and running at a place that we really wanted it would be benefit to the community. Members of the community and the family, the church…in every area it would benefit. It would even benefit the country. Well to our crime rate it would be down. Our teenage pregnancy, right. We'd have better women and men for tomorrow. These children

would be moulded; they would be supervised, right. It's gonna help back the

government, because the government is going to have less crime to deal with. The

government is going to have less teenage pregnancy when they won't have to pay

somebody to come and teach two pregnant teenage girls[9] there. The husband will

stay in him wife house and him won't go girl a look and him won't get an STI so the

health centre won't have to pay for that STI injection that the man is going to get.

The teacher at school will have it easier, the child homework will done.

As Cassandra suggests, the impact of one social enterprise in a community creates a

number of successful interventions that could reduce or prevent crime, the number of

teenage pregnancies and family breakdowns and improve health care for sexually

transmitted infections. A reduction in these issues not only creates better community

cohesion and social relations, but also represents a cost saving and consequent economic

benefit for the government. As discussed in Chapter 2, Jamaica's economy is stagnant,

but it appears that the third sector, including social enterprises, is making a meaningful and

considerable contribution not just to individuals and their families, but to the national

economy as well. In fact Dr K'nife articulated the cost-benefits to society that the third

sector creates through just one program he had examined:

The Jamaican economy has not grown for the past 50 years in any real meaningful

way. But yet when you go into communities you can see significant infrastructure

development and social development and people relations being better than how it

is… New Horizons have a program that engages 50 youths…these are youths who

come [from] at risk communities, and at times you will find that a lot of them might

end up in crime or become victims of crime. If you assume that is 10 per cent of

those youths them, become a victim of crime, if 50 youths, that's five people. How

much does it cost to keep a youth in prison for year? One million (Jamaican

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[9] By law, school-age pregnant teenagers are required to leave school during their pregnancy; schools had misinterpreted this as requiring a permanent absence. A reintegration and outreach program is now in place to reduce dropout and to work with teenage mothers.

dollars), that's five million they have saved Jamaica in a year. Now you have 140,000 youths who are at risk in Jamaica and who are unattached. You have a next a larger component who are actually attached in programs as well. So it means that if those programs didn't exist you would have a larger population of unattached youth. With a larger population of unattached youth which means the potential to become involved in crime, you have a larger cost to the Jamaican society. So as the cost part, in terms of how you can do cost savings but there is a benefit part as well because when we these youths go through these programs, them generate real value for the individual themselves in terms of how their lives have improved and then when them start to utilise these skills.

Saffrey Brown from the JN Foundation also confirmed the support that the third sector provides to Jamaica:

I think that civic society, Jamaica has a very, very strong civic society, right, civil society. And I've always said if civil society was to close up shop today the Jamaican economy would collapse. It is so propped up by the third sector; most Jamaicans would do some kind of service to others…more so than anywhere else, than England or Trinidad, it's nothing like that. You talk to somebody like Dr K'nife and he believes that Jamaica has been in negative growth for the last 50 years and the only thing that has been in growth phase is the third sector which is why Jamaica has been able to show zero growth. But if you took away the third sector Jamaica would be in massive negative growth. And I believe that is correct. I believe that is correct because the innovators in Jamaica in the third sector that is where the level of innovation happens. And that's why, you know, anybody from Jamaica who worked in the third sector, can work anywhere in the world.

Dr K'nife further articulated research on the role of the third sector on people's wellbeing in Jamaica.

The research on social inclusiveness actually show that people in them community feel very good about themselves. But them also feel that they are discriminated against because of where them coming from. But them very happy to be Jamaican and etc. etc. etc. so there is a kind of, it's almost a kind of oxymoron. So what force is that, what causes that? It means that while something is making it bad, which is the former space, there is something that is making it good. And the one, the reason you don't have chaos then must be because the good elements must be greater than the bad elements themselves. That is where our third sector come in. We do well in sports that's not a state supported institution. We do well all in the things in the creative industry, the music, the children who do art together, them sing, dancing competitions, everything that is in the creative and cultural industries. Those are things that are supported by third sector organisations not by state organisations. Even in the school system, you know, the person who is the sports teacher stays after class and do a work. That's not a work being paid for by the state you know. That is her own institutional contribution to the development of these students and if you ask them why them do it, them tell you say, you know, it gives them a chance to do something. So this third sector thing crosses so many different areas as well. And it phenomenally high I'm saying that if you look at Jamaica's data it doesn't support why Jamaica should have a very high Happiness Index ranking so what makes we have the high happiness? It has to do with the non-traditional institutions playing a role.

6.5   Chapter Summary

This chapter has provided an overview and background information on social enterprises in Jamaica and a closer analysis of the two cases – Superior Crafts and More and Cockpit Treats. The findings from the two case studies were presented through the lens of the APE model.

The first dimension - access - was experienced by the participant workers as a sense of economic inclusion and financial independence, which enabled them to take control of their finances, look after their families and contribute to both the household and the national economy. Furthermore, the SEBI training provided created better efficiencies in running the social enterprises.

The second dimension - participation - examined the participant workers' participation in formal and informal community activities, their ability to make decisions in the workplace, their relationships with colleagues and the impact of the work on them.

The third dimension - empowerment - investigated participants' hope and their ability to envision a better future, their engagement with exclusionary agents and the shifting of the power dynamics, their emotional wellbeing and finally the impact of their work on the community.

The next chapter concludes the thesis and draws together the literature, research and findings. It will present a discussion of the findings and their implications for social enterprises, in terms of the literature, practitioners and policy makers. It concludes with an evaluation of the research, considers its contribution to knowledge and offers future research directions and recommendations for policymakers and practitioners.

CHAPTER 7   DISCUSSION AND THESIS CONCLUSIONS

The previous chapter examined the research findings of this study. This chapter commences with an overview of the research findings as they relate to the research question; *how do participant workers employed in social enterprises in Jamaica, experience quality of work life and social inclusion through access, participation or empowerment?* The chapter then progresses onto a discussion of the key issues that emerged from the study's findings, namely, the role of government, financial wellbeing, training, participation, empowerment and structural exclusion. Following this discussion, the chapter then considers the theoretical, practical and policy implications of this research, and goes on to make recommendations that may enhance social inclusion and quality of work life for participant workers. It outlines the limitations of the research, before considering other areas for future research, and concludes with a personal reflection on the research process and future practice from the perspective of a practitioner-researcher.

7.1   Discussion of the Findings

Broadly speaking, participant workers experienced improved social inclusion and quality of work life through the dimensions of access, participation and empowerment. Generally they attained a modest level of financial independence and control, felt better able to participate in social activities, improved their relationships with family and friends, experienced feelings of hope and had the confidence to speak up and engage with exclusionary agents on an individual level. Figure 16 shows the experiences identified from this research, utilising the access-participation-empowerment (APE) model.

Figure 16: Experiences of social inclusion and quality of work life through the APE model
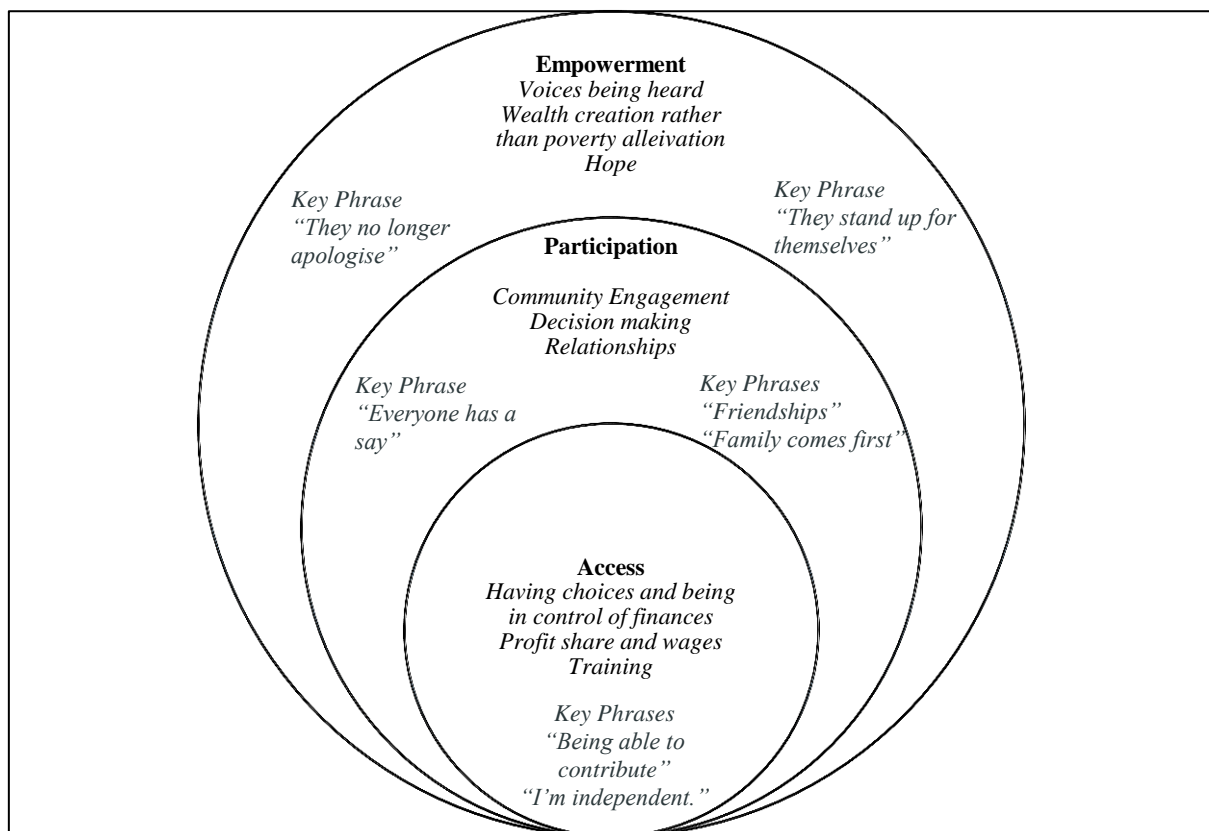
The APE model employed in this study presents participant workers' experiences of social inclusion and quality of work life through the dimension of access as:

- having control over their personal finances, and the notion of financial independence;

- the ability to earn money from their labour via wages and profit share distributions;

- undertaking the training and learning opportunities provided by JN Foundation's SEBI program, particularly as participant workers had limited educational attainment and/or business management skills; and

- the sense of being able to contribute to their families and the wider community.

Through the participation dimension, participant workers' experiences of social inclusion and quality of work life were experienced as:

- community engagement, where the social enterprise has an impact on the community in which it and/or the participant workers' resides, creating a sense of

community cohesion. This was most conspicuous in rural community of Ulster Spring and the women of Cockpit Treats, who organised voluntary working bees to clean up the community, and less so with the participant workers of Superior Crafts and More. Their impact was not directly experienced in Kingston, where the social enterprise is located but more so around their own homes and neighbourhoods, where they interacted with local residents in a bid to reduce stigma and prejudice by exhibiting their handicrafts and demonstrating their skills;

- the ability to make decisions, through the governance structures of the social enterprises, so that all participant workers have a say in the running of their businesses, as well as making choices in their personal lives, such as whether to stay in the local community or migrate to the city; and

- improved relationships with family, and making new friends with co-workers and others in the community.

Finally, participant workers experienced social inclusion and quality of work life through the prism of empowerment as:

- their views being represented in their workplace directly with customers, through SEBI functions and on the streets. In particular, their ability to have their voices heard by and engaged with, by some exclusionary agents;

- the potential of the social enterprise to become a vehicle to create wealth, rather than just a tool to alleviate poverty; and

- the notion of hope, which addressed their visions of the future and their ability to plan for a better future for themselves and their families. This was achieved through the SEBI training, and earning an income through the social enterprise, which made the difference between a woman having to migrate to the city and lose her family, or in the case of Superior Crafts and More having a sense of purpose and belonging.

What follows is a discussion of the key issues that emerged through the prism of the access-participant-empowerment model, specifically the role of government, financial wellbeing training, participation, empowerment and structural exclusion.

7.1.1 The Role of Government

On considering the role of government, participant workers generally believed it should offer financial assistance in the form of grants to help individuals or groups establish a social enterprise and to provide access to the requisite business training. In particular, the women participant workers at Cockpit Treats explicitly stated that government should inject cash into communities, and specifically into women's groups, to fund social enterprises. As discussed in the previous chapter, there is no policy framework in place for Jamaican social enterprises and thus no such funding available. However, the government does fund the extension officers from the Rural Agricultural Development Authority (RADA), who perform outreach into the rural and regional communities and help establish groups such as Cockpit Treats. Thus, the government has to some extent, recognised the special role that women play in rural communities through the establishment and funding of this outreach program and its officers.

7.1.2 Financial Wellbeing

Modest financial wellbeing was achieved through the money earned by participant workers through their work at the social enterprise, as participant workers at both enterprises were not paid a regular salary. They earned a piece rate at Superior Crafts and More, and a casual rate at Cockpit Treats. As members of a cooperative they were all entitled to receive a share of any profits at the end of the financial year. The minimum wage in Jamaica is J$6,200 per week for a 40-hour working week, but for the participant workers, if there was no work, or no profits to share, then they would receive nothing. There was no guarantee of earning the minimum wage or of access to secure, stable or regular income. Yet despite this, participant workers believed that having something, even a small amount

of money that they had earned through their own labour, in a business in which they owned a share, contributed to an overall positive sense of financial wellbeing and independence. This is consistent with the literature that emphasises the importance of microfinance microenterprises in improving living standards and providing independence for women, (Alvarez, Barney & Newman 2015; Anderson, Locker & Nugent 2002) and providing more financial control to manage being poor (Roodman 2012). The findings suggest that participant workers felt in control, in that they had the choice to save or to spend their earnings, as well as the capacity to contribute to their families' needs, and to their nation through their payment of taxes.

Interestingly the participant workers were eligible to receive welfare benefits but chose not to apply for these grants. In fact they appeared scornful of the PATH welfare program and were not favour of handouts believing that the disadvantaged should participate in training and employment opportunities or receive government funding to establish their own enterprises.

While Blake and Gibbison (2015)'s study of PATH found that only 56 per cent of eligible households applied for the benefit. The key reasons they did not apply were (i) informational problems (lack of understanding about the eligibility criteria, the program or the application process); (ii) finding the application process too difficult; and (iii) attitudinal factors such as the stigma of receiving welfare and having to provide too much information. This correlates with the responses from the participant workers who were confused by the application process and the eligibility requirements which deterred them from applying for welfare for their household.

However underlying this, is an attitude that the individual is on their own and needs to be self-reliant. Chapter 2 presented the political, historical, economic and social context that Jamaicans must operate in and navigate. As discussed structural inequality, lifelong impoverishment and limited safety nets are de rigeur for most Jamaicans. After the

abolition of slavery, slave owners and not the enslaved were compensated. Newly freed slaves were not guaranteed or entitled to paid work or accommodation from their former masters and had to be self-reliant. Not only was this was reinforced by those in power who wanted to ensure they retained their power base and resources but by social revolutionaries like Marcus Garvey who also promoted self-reliance. Not surprisingly the legacy of being self-reliant and independent has endured to the present day.

7.1.3   Women in Domestic Service

Whereas this thesis has been concerned with participant workers of social enterprises, consideration must be given to domestic service which is the only real employment option for socially excluded women who bear a significant social reproductive burden. Over one third of Jamaican working class women work in domestic service and they represent the largest single group of working women. Cockpit Treats is a community intervention strategy that enables women to stay in the local community with their families. However the challenge faced by Cockpit Treats over its business premises forced one participant worker to leave the social enterprise to find paid employment in the city as a domestic worker. Unfortunately, not only is she now absent from the family home for weeks at a time, but her young daughter has also suffered neglect and illness as a result. Domestic service is hard on the women and their families, and it is poorly paid. Earning the minimum wage of J$6,200 per week, while having to spend a third of it on transit costs to visit home, does not enable a woman to be able to save, or to feel like she has control of her life, in comparison to working at a social enterprise. Arguably there can be no feeling of independence for the domestic worker; on the contrary she becomes heavily dependent on those around her. She is reliant on her employer for her income, and a safe, non-exploitative workplace. She is forced to rely on her extended family to look after and nurture her children and on her partner to not stray into infidelity and pass on a sexually transmitted infection. As a domestic worker, she has very little means to break the cycle of

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disadvantage. Given that hundreds of thousands of middle and upper-class Jamaicans employ more than 100,000 women in their homes as domestic workers, there appears to be little motivation or political will to change this arrangement. This is particularly the case, given that until just recently an eight-week paid maternity leave scheme[10] for domestic workers has only just been introduced in 2017. Therefore the research supports the view that job instability, poor working conditions, limited employment opportunities, and unemployment are indeed mainstream problems of the working class (Davies 2005) and that working in low paid jobs will neither remove structural exclusion nor alleviate poverty; as a matter of fact they appear to aggravate inequality and marginalisation (Davies 2005; TUC 2014). Indeed the findings also point to the precarious position that social excluded women face as they have limited options in their lives. These women must choose between a regular wage earned through domestic service that has a negative impact on her social reproductive responsibilities or earn irregular, unstable income through a social enterprise which comes with more control along with social and economic independence.

7.1.4   Training

The training provided through the JN Foundation's SEBI programme improved participant workers' business management skills, as well as food production knowledge in the case of the Cockpit Treats women, to enable them to build more effective organisations and become better business people and food producers. However, these skills, while they have engendered a deeper understanding of their business and improved their product offerings, have not necessarily helped them to secure new customers and business networks, or to navigate administrative and bureaucratic processes. In the case of Superior Crafts and More, they do not have the contacts or networks to find cheaper raw

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[10] Jamaica's current maternity leave legislation does not recognise or make provision for domestic workers as they are deemed as unqualified workers and do not enjoy the same protections as the 'qualified' workers whose homes and families they look after. The new scheme is based on national insurance contributions made through a worker's wages. If employers do not pay these contributions, then workers will be ineligible to apply for this and other benefits that are funded through these contributions.

materials direct from the Chinese suppliers. This situation not only reveals their lack of power but also demonstrates how the disempowered lack access to the right networks and resources (Gutiérrez 1990). Likewise, at Cockpit Treats the training did not enable them to gain access to the church council, the Synod or senior bureaucrats to work through their issues relating to the business premises. Specifically, the training did not include some of the crucial tacit knowledge and experience in running a business, such as how to establish and use networks to further one's operations. Interestingly, the funder JN Foundation believed that some of the training was too sophisticated and complex for the community grassroots social enterprise, Cockpit Treats. Yet the participant workers appeared to not only enjoy the training but also gain increased confidence, not just in running a business, but in conducting their personal lives. They were undeterred by the gaps in their knowledge; on the contrary, it aroused their ambitions. For example, Cockpit Treats aspired to wholesale their products more widely through supermarket chains as well as retailing their products to their local community. Thus, the participant workers reflected the notion of the "respectable poor" as described in Chapter 2, section 2.2.3 with their "aspirations of upward mobility and ambitions for self- and community- recovery" (Gray 2004, p. 14).

7.1.5 Participation

Based on the data, participation was a strong aspect of the access-participation-empowerment model, as experienced by the participant workers. This supports the literature, which reports that social enterprises, like not-for-profits, create participatory opportunities for their beneficiaries as they have both a social mission and a profit motive. The JN Foundation's SEBI program hosted and offered events which provided opportunities for participant workers to network with other social enterprises. Policy makers, the media and potential customers were also invited to attend some of these events. The exposure to new and different experiences raised the aspirations of the participant workers, in that they could see a new world of possibilities opening up for them.

They could see the potentiality of their social enterprise in reducing crime, family breakdown, stigma and discrimination in their world.

The two social enterprises created many internal opportunities for social interactions through work tasks and participation in social and recreational activities with other community groups, as well as the chance to develop meaningful friendships with their colleagues, who could support them in times of crisis or distress. This aligns with the argument from Sen (2000) that the excluded must rely on such friendships and informal networks for emotional support and help.

7.1.6 Empowerment

The findings suggest that to some extent participant workers experience a form of catharsis as they work within the social enterprise. Through their training, work duties and relationships with their co-workers, they become self-aware and undergo personal growth, as evinced by the participant workers who admitted that they had previously mistreated their children and had now found a better way to communicate with them. Whereas Gutiérrez (1990) contends that empowerment is a combination of the individual gaining the reins of control, and taking action while making structural changes to receive an equitable distribution of resources, Stromquist (2014) and Turner and Maschi (2015) assert that empowerment through consciousness-raising enables the disempowered to find their own solutions. The participant workers certainly took control, on a personal level, like the respondent who stood up for blind people being excluded by individuals outside of the workplace and the women of Cockpit Treats who lobbied the local church minister for use of the training kitchen. But they did not appear to consider or examine the institutional or epistemic barriers to their exclusion that needed to be dismantled. Nor did they seek to challenge, or ask for their fair share of or access to resources. However, it appears that their consciousness was not raised in the way that Gutiérrez (1990) suggests.

The data also show that there is a gender element linked to empowerment. In the case of Cockpit Treats the government had long recognised the difficulties faced by rural women and established programs to specifically support them and their families.

As previously outlined in chapter 2, Jamaican woman bear heavy social reproductive responsibilities and receive limited support from their men. In Ulster Spring it was evident that the women were the glue for their community and ensuring they stayed within it was actively encouraged by both the government and the women themselves through the establishment of the social enterprise. For example they performed unpaid tasks such as the community clean up, cleaning the police cells and providing meals to the elderly and housebound. While the women experienced empowerment on an individual level, there was no systemic change or dismantling the patriarchal power structure. Men still created barriers to their empowerment, by not allowing them to use the church training kitchen, sharing child care or community development responsibilities.

7.1.7   Social Exclusion

This research found that social enterprises appear to have a positive impact on the individuals' sense of participation and control over their finances. Working in a group, and being able to organise themselves and arrange their work, as well as participate in decision making and social activities enables them to build their confidence and self-esteem. Yet, as discussed in the previous section 7.16, this does not represent a removal of the institutional barriers which have marginalised the participant workers in the first place. Thus, while participant workers can feel a sense of control over their individual lives, this appears to have very little impact on society and the institutions around them. Indeed social enterprises appear almost paradoxical in nature. On the one hand they appear to offer participant workers experiences of access, participation and empowerment and yet at times they offer the opposite. These businesses have created conflict such as the kitchen dispute and the participant worker who left her husband at Cockpit Treat and offer only

limited financial gain rather than wealth creation. However the participant workers are facing complex situations balancing family relationships, maintaining their income, managing their social and economic responsibilities. This is a precarious balance that participant workers struggle to maintain and at the heart of this, is social exclusion. Thus this section looks at specific aspects of social exclusion experienced by the social enterprises and the participant workers.

7.1.7.1   Exclusion of the Social Enterprises

The research shows that the social enterprises, as entities themselves, face a form of social exclusion through financial exclusion. Both organisations, like 75 per cent of social enterprises in Jamaica (K'nife 2016), experienced ongoing financial challenges as they could not access overdrafts, credit or finance from mainstream financial institutions. This was due in part to their lack of knowledge of the process and subsequent lack of confidence, as well as their low earning capacity. Instead the social enterprises secured informal loans and donations through their networks of family, friends and members. In the case of Superior Crafts and More they also received formal grants from philanthropic bodies.

7.1.7.2   Limited Access to Political Networks

Another aspect of structural exclusion faced by Superior Crafts and More stems from their lack of networks and resources to help them source cheaper bamboo from China. Paradoxically, Jamaica has a strong relationship with China. The country has a sizeable Chinese community, which makes up approximately 1 per cent of the population[11]. This has seen the Chinese government invest hundreds of billions of Jamaican dollars in the country, including major infrastructure projects and the provision of military equipment for the Jamaica Defence Force. The building of a new 67km superhighway from Jamaica's

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[11] There are approximately 30,000 Jamaicans with Chinese heritage. The Chinese first arrived in Jamaica as indentured labourers at the abolition of slavery to replace newly freed Africans and have continued to migrate during the twentieth century.

north to south is in fact, the single biggest investment by the Chinese in the region. As discussed in section 6.1 social enterprises are not on the government's radar. Hence, at a policy level, the government has not created bilateral trade agreements or facilitated opportunities for social enterprises to access the Chinese market. As previously discussed in section 7.1.5, the participant workers at Superior Crafts and More did not participate politically, relying on their informal networks to provide assistance and word-of-mouth promotion to generate sales, even though their manager also worked part-time at a government agency. They felt unable to engage in any advocacy to counter the challenges they were experiencing with getting their raw materials. Furthermore, while they had met government officials through the JN Foundation SEBI business networking events, Superior Crafts and More had not taken any action in terms of trying to secure government contracts or financial support for their social enterprise. As a result, not only are they missing out on significant business opportunities, but the lack of political participation is a deprivation which, Sen (2000) asserts, diminishes society. This research study finds that actively excluding the marginalised from political participation will continue to reinforce Jamaica's socio-economic status quo, and maintain privilege and power amongst the elites (Wright & Stickley 2013).

On the other hand, in contrast to Superior Crafts and More, Cockpit Treats did become somewhat politically engaged in order to promote their products to wider networks. They had met with their local Member of Parliament, and had secured catering work from the local Council in the past. This may have been as a result of the group having been established with the support of a government agency (RADA) and two participant workers having been previously employed by government agencies in Jamaica and the UK.

7.1.7.3 Lack of Awareness by Participant Workers of Exclusionary Practices

One participant worker had argued that disabled people should work and not receive any government hand-outs, nor should they beg on the streets. While others were more sympathetic, the participant workers did not articulate what employment options were

available to the disabled in Jamaica. Moreover, they did not appear to correlate their own experiences of prejudice with the broader discriminatory employment practices, which see disabled women and men experience an unemployment rate of 82 per cent and 73 per cent respectively (Gayle & Palmer 2005). In this way, the participant workers at Superior Crafts and More reflected the rhetoric of moral underclass discourse which sees the excluded as moral degenerates, who are to blame for bringing their situation on themselves and argues that they simply need to adopt a 'good work ethic', to escape poverty (Davies 2005; Levitas 2004). Interestingly, with the exception of Mr Mead, all participant workers at Superior Crafts and More had led reasonably sheltered lives, growing up in the closeted confines of the Salvation Army School for the Blind, and had training and employment pathways mapped out for them through the Abilities Foundation, the Creative Craft Unit or friends.

7.1.7.4   Customers as Exclusionary Agents

The role of the customers, who exchange their money for the participant workers' labour is a significant contributor to the participant workers' financial wellbeing. The customer has the power to spend or not spend at the social enterprise and therefore has a significant level of control over the participant worker's access to financial resources. As employees of a work integration social enterprise (WISE) the participant workers were, in reality, beneficiaries of a social service. Garrow and Hasenfeld (2014) assert that WISEs operate as a community of marginalised individuals coming together to meet their needs, but simultaneously are forced to behave as commercial operators. Some customers utilised their purchasing power in an attempt to control pricing, by demanding price reductions, or bargaining over the price charged in an attempt to take advantage of the participant workers' marginalisation. The inherent tension discussed in Chapter 3, section 3.3.2 between social mission and business goals, sees customers measure and hold accountable the participant worker against market standards. Thus, these customers

continue to exploit and exclude the very people who are trying to use their labour in the social enterprise to escape exclusion and marginalisation.

7.1.7.5   Exclusionary Practices by Government

Given the lack of a government policy framework to support the unique attributes of social enterprises in Jamaica, participant workers face considerable structural exclusion. The bureaucratic pedantry faced by the women of Cockpit Treats, who simply want to bake and sell their products, is significant. Being forbidden to trade or to formally register their business, because of the use of a home kitchen that must be blocked off from the rest of the house seemed unreasonable. This single factor means they cannot access funding from any philanthropic or granting body and technically cannot produce or sell any food until the issue is resolved. Using the causal chain proffered by Sen (2000) and described in Chapter 4, section 4.1.3, this lack of understanding on the part of the Department of Cooperatives and Friendly Societies, has created both active and passive exclusion of the participant workers. Lacking the capital to secure commercial premises, the participant workers are actively excluded from operating their business by this policy, which, in turn, excludes them from the very market place which, according to neoliberalism, is the solution to their marginalisation.

7.2   Research Implications
7.2.1   Implications for Theory

This study was exploratory and utilised a case study methodology. It set out to investigate current practices and their effect on experiences of social inclusion and quality of work life of participant workers, with a view to proposing solutions to improve current practice. This thesis sought to answer the research question: *how do participant workers employed in social enterprises in Jamaica experience quality of work life and social inclusion through access, participation or empowerment?*

The study developed and employed the APE framework which was introduced in Chapter 4. This model emerged iteratively from the literature and the data and uses a nested schema based on three ideologies, namely neoliberalism, social justice and human potential. It was utilised to evaluate participant workers' experiences of social inclusion and quality of work life, through their employment at a social enterprise. The APE model is significant, because it moves beyond simplistic measures of economic access and participatory experiences, and offers a robust examination of structural exclusion, epistemic barriers and genuine experiences of empowerment based on human potentiality. Critically, the model addresses an identified knowledge gap and will assist future researchers wishing to investigate this phenomenon in their own research.

7.2.2 Implications for Practice

This study is significant for practitioners, because it engages wholeheartedly with the participant workers. It considers their voice, and examines and shares their lived experiences, while providing a framework, which has arisen from their understandings, with which to evaluate their own experiences.

Furthermore, it reminds practitioners that social enterprises, while seemingly worthy causes on the surface, have emerged as a result of, rather than a response to, neoliberalism. It also reinforces the notion that neoliberalism is only concerned with profit and utility maximisation (Fukuda-Parr 2003), and that it ignores love, hope, faith (McCloskey 2006) and human capability, which are the very attributes that any society needs to reduce the marginalisation and exclusion of particular groups of individuals.

This thesis invites practitioners to examine whether their social enterprise merely provides simplistic opportunities for economic inclusion and participatory experiences or, at a richer level, affords genuine empowerment that raises the consciousness of participant workers and enables them to examine and challenge structural exclusion. Related to this, practitioners need to consider what behaviours and patterns their social enterprises are modelling and reinforcing for their participant workers; how can they help create

experiences of hope and long-term planning if they are facing financial exclusion themselves, or if they simply accept structural exclusion and spout the rhetoric of a 'good work ethic', rather than the abolition of disadvantage (Levitas 2004).

7.2.3   Implications for Policy

Many countries around the world have recognised the potential of social enterprises to reduce social exclusion and alleviate poverty. In response they have created legislative frameworks, regulations, funding and other policy supports. For a heavily indebted government that is faced with a population burdened by poverty and disadvantage, and a stagnant economy, social enterprises have the potential to create healthy, happy and productive communities. But without a policy framework in place, bureaucrats are forced to rely on pedantic, inflexible and administrative officialdom that does not fit this new business model. Such a bureaucracy inadvertently excludes participant workers with limited educational attainment, as they have to prove the worth of their concepts and demonstrate how they create social value. On the other hand, heavily prescribed policy constructs can strangle innovation, and shape the model of social enterprises, as has been seen in the UK, where they moved from collectivist models to individualistic decision-making entities with asset locks to prevent profit-sharing amongst members.

7.3   Recommendations

This Doctor of Business Administration thesis deals with matters relating to professional practice; while it is underpinned by theory, its primary purpose is to extend practitioners' knowledge rather than extend theoretical arguments. Therefore, its focus is to provide an understanding of the factors that can empower participant workers and improve their quality of work life and social inclusion. By recording the lived experiences of participant workers, the researcher aims to enable academics, practitioners and policymakers to inform, modify or restructure their practices and policies, in relation to social enterprises

and participant workers. What follows then, are the recommendations that have arisen from this study.

7.3.1   Recommendations for Policymakers

It is critical that current legislative frameworks regulating business and cooperatives are reformed to recognise social enterprises, with particular emphasis on those that are owned and operated by participant workers who may not have the skills, educational attainment and resources needed to meet all current bureaucratic requirements. Policymakers should also offer the tax concessions that are currently available for not-for-profits, such as reduced duty on imported goods, to social enterprises with an annual turnover of less than J$1million. Given that Jamaica is a tiny island and heavily dependent on imported goods, social enterprises need support in this area if they are to be competitive in the marketplace.

From Bob Marley to Usain Bolt to holidays in the sun, brand Jamaica is worth an estimated US$35billion annually, but the government has had problems monetising and exploiting its true value in the international marketplace (Myers Jnr 2014). It is vital, then, that the government recognise the role and value of social enterprises to the national economy and ensure they have equal stature with other businesses. All international trading agreements should include participatory opportunities for social enterprises.

Both the national government and local parish councils can directly support social enterprises by providing grants and establishing procurement policies with quotas that include goods and services that are purchased from social enterprises. In the case of the two social enterprises in this study, that could mean booking Cockpit Treats to provide catering services, and hiring Superior Crafts and More to provide repair services to the antique furniture at the official residences of the prime minister and governor general - Vale Royal and King's House respectively, as both contain many beautiful, antique pieces. Further newly hand-crafted furniture could be purchased for government offices and council chambers.

Finally, policymakers in recognising social enterprises, need to understand that they are not an overnight 'quick fix' to the systemic issue of marginalisation faced by participant workers. The reality is that, although the participant workers are employed, they are still impoverished, due to their low pay and unstable income. Thus, the government could provide direct economic support for those who are desperately attempting to break the cycle of disadvantage – such as the provision of welfare benefits to ensure they can receive at least the minimum wage, or free healthcare, public transport, education and childcare concessions.

7.3.2 Recommendations for Practitioners and Funders

Given that 15 per cent of Jamaica's GDP comes from remittances, as discussed in Chapter 2, section 2.2.2 a huge potential market for the goods and services of the social enterprises lies in the Jamaican diaspora that is spread across North America and the United Kingdom. With the support of government and the key businesses that are engaged with the diaspora, such as the remittance, travel and shipping services, the diaspora should be activated to support Jamaican social enterprises. In particular, special attention should be paid to the first and second generations, who were not born in Jamaica, such as the researcher, who do not send remittances but would consider purchasing products online. Engaging the diaspora will not only create closer ties with those living overseas, but also open up new local and international networks for the social enterprises.

The stakeholders who offer training to social enterprises must ensure that they include training in 'soft' business skills, such as 'how to network' rather than just the hard skills of setting a budget. Training providers should also work hard to avoid passively excluding particular groups, such as mothers who may not be able to attend because of their childcare duties, or their limited access to public transport. Ultimately, any training provided should seek to genuinely empower participant workers by raising their consciousness about the barriers that exclude them, and not just increasing their business nous.

Externally, there needs to be an education of the wider community and government in understanding the scope and purpose of social enterprises, so they can offer their support and not inadvertently contribute to exclusionary practices that further marginalise participant workers. Finally funders should not consider the return on their investment in social enterprises in simply as profitability and poverty alleviation but also as empowerment and wealth creation. Practitioners and funders need to take into account their own role in creating and reinforcing exclusionary practices and policies and seek to eradicate them.

7.4   Limitations of the Research

This research examined the feelings of social inclusion and quality of work life experienced by participant workers employed in Jamaican social enterprises. To answer the research question, the researcher employed an exploratory case study methodology. Using this method, along with observation and a review of the literature, the researcher was able to understand the phenomenon deeply and over time. The research sample was small; only two cases were examined and sixteen participants were interviewed and observed. All the participant workers were interviewed in groups rather than individually, as this is how they wanted to participate. While this created a collegial atmosphere, questions around each individual's personal finances were not asked as the researcher understood that to ask questions about personal income in a public forum is taboo in Jamaican culture, and she wanted to respect each individual's right to privacy. Furthermore the researcher was unable to secure interviews with the main funder, the United States Agency for International Development, or with any government officials working at the Department of Co-operatives and Friendly Societies.

7.5   Future Research Directions

Yin (2012) argues that exploratory case studies should be considered as pilot tests that assist in developing the framework for future studies. With this in mind, the limitations,

along with the findings that arose from this study, would be worthy of consideration for future research activities.

7.5.1 Longitudinal Study

Studying a case over two different periods in time (Yin 2009) will enable the researcher to capture the fluidity of the experience of social inclusion and exclusion. Thus, extending this study to a longitudinal project would provide increased time to observe any changes in the participant workers, other stakeholders, policymakers and the business itself.

7.5.2 Different Models of Social Enterprises

This study investigated social enterprises that were deemed as community businesses according to the Teasdale (2010) model, which describes them as having an economic primary purpose and a collective decision-making structure. Social businesses also have an economic primary purpose, but operate on an individual decision-making level. It would be useful to compare these two types of businesses to see whether either provides greater or lesser experiences of social inclusion and quality of work life.

Finally, this study examined two social enterprises that worked with those experiencing marginalisation because of their gender, geographic location or disability. Other sources of marginalisation exist, such as criminal history and mental health. Therefore, research into the different types of exclusion, and the relative impact of social enterprises on participant workers' experiences of social inclusion, could be undertaken.

7.6 Personal Reflection

The initial motivation for this study was based on incipient observations that while social enterprises positively impacted participant workers, the role of the funder, rather than the participant worker, appeared to be central to the model. Thus, the primary rationale was to explore how social enterprises impacted participant workers' experiences of social inclusion, utilising their own voices. This thesis has sought to draw attention to the core

elements in assisting practitioners and participant workers working in social enterprises. Being immersed in this study has been a very positive and engaging experience and has enhanced the researcher's own work practices.

Through the process of this study, the researcher has undergone catharsis. That is to say, she has moved from a social justice view of social enterprises, to an understanding that the individual can only do so much, and that the structural barriers must be challenged and removed in order for participant workers to experience genuine empowerment. In short, her own consciousness has been raised.

It is hoped that the conclusions and recommendations that are drawn from this study will encourage:

- new research into the role and experience of participant workers;

- funders to consider a return on investment that includes genuine empowerment, and to reflect on their own role in creating structural exclusion,

- policymakers to develop flexible frameworks that are nested not in neoliberalism, but in ideologies of human potentiality and social justice.

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Appendix 1 Victoria University Ethics Committee approved information for research participants

INFORMATION TO PARTICIPANTS INVOLVED IN RESEARCH

You are invited to participate

You are invited to participate in a research project entitled 'Quality of work life on participant workers employed in social enterprises in Jamaica and its impact on experiences of social inclusion'.

This project is being conducted by a student researcher Erica Myers-Davis as part of a Professional Doctorate Program at Victoria University under the supervision of Mr Richard Gough and Dr Annie Delaney from the College of Business.

Project explanation

This project is a case study examining quality of life experienced by people that work within social enterprises in Jamaica. The project seeks to better understand the factors that may enhance and improve workers' experiences within the social enterprise they are employed at as well as their life outside of work, such as at home and in the community.

What will I be asked to do?

The project investigator, Erica Myers-Davis will discuss for approximately 60 minutes with you about your experiences concerning social enterprises. The interviews may take the form of a dialogue or conversation. She will take notes of the conversation either by hand or on a computer. She will only audio record the conversation, and only if you agree to it being recorded.

What will I gain from participating?

Although you may not directly benefit from this research, the research will assist to gain better understanding about the quality of life for people experiencing physical, economic or social challenges, and about any successful strategies used by social enterprises in Jamaica to improve how their lives at work and outside of work may be addressed. This may benefit participant workers in general. She will share and discuss this information with any participant who wishes to have it, and who may find it interesting and useful.

How will the information I give be used?

With your permission Erica would like to audio-record the interviews, and take photographs of, workplaces or organisations (such as social enterprises) and their artefacts (such as banners/publicity posters). The audio-recordings will be stored on her computer. Participant names will not be included on the record of the interview, but the interview will be coded, to differentiate it with other interviews, and in case she wants to check something with you. Computer files, including recordings, transcripts or digital photographs, will be kept on password-protected computers in locked offices and kept for seven years, after which they will be deleted. Any transcripts of interviews or photos which are printed on paper will be stored in locked cabinets. Erica will keep this data for seven years, after which time it will be destroyed by shredding. If at any time you decide you would like the record of interview to be destroyed, then you should let her know and she will make sure that all copies of the record of interview are destroyed. She is also happy to provide you with a copy of the transcript of your interview, findings and any publications, if you would like to receive any of these.

What are the potential risks of participating in this project?

The only risks in this research are the possibility of public identification of participants. To minimize this risk, Erica will not publish the name of any individual or organisation unless the organisation and individuals, who have participated in interviews, specifically request it. Erica will discuss with you any details around anonymity and access to draft publications at the time of the interview.

You may withdraw from this research project at any time. There are no disadvantages, penalties or adverse consequences for not participating or for withdrawing from the research. You have the right to demand that data arising from your participation is not used in the research project provided that this right is exercised

within four weeks of the completion of your participation in the project. You are asked to notify Erica by e-mail or telephone that you wish to withdraw your consent for your data to be used in this research project.

You will be asked if you would be willing to have this material used in public materials such as scholarly publications and will be informed that you are free to withdraw your consent for the use of your personal quotations, narratives or photos at any time up until the point at which publications have been finalised.

How will this project be conducted?

The audio recordings will be transcribed and then written up. What Erica learns from the interviews and discussions and, after discussing it with people from your organisation/yourself, this information will be published in academic journals and books.

Who is conducting the study?

The Chief Investigators and supervisors of this project are:

Mr Richard Gough +61 9919 4640 richard.gough@vu.edu.au

Dr Annie Delaney +61 9919 9487 annie.delaney@vu.edu.au

The student researcher is:
Erica Myers-Davis the College of Business, on telephone number +61 450 425 536 or by email: erica.myers-davis@live.vu.edu.au.

Any queries about your participation in this project may be directed to the Chief Investigator listed above.

If you have any queries or complaints about the way you have been treated, you may contact the Ethics Secretary, Victoria University Human Research Ethics Committee, Office for Research, Victoria University, PO Box 14428, Melbourne, VIC, 8001, email researchethics@vu.edu.au or phone (03) 9919 4781 or 4461.

Appendix 2 Victoria University Ethics Committee approved plain language statement for research participants

<div align="center">

Participant Information /Plain language statement

Project Title: Quality of work life on participant workers employed in social enterprises in Jamaica and its impact on experiences of social inclusion.

</div>

Project Investigator:

Erica Myers-Davis, DBA Candidate, College of Business Victoria University

erica.myersdavis@vu.edu.au

Project Aims.

This project is a case study examining quality of life experienced by people that work within social enterprises in Jamaica. The project seeks to better understand the factors that may enhance and improve workers' experiences within the social enterprise they are employed at as well as their life outside of work, such as at home and in the community.

Funding bodies/arrangements. This project has received funding from Victoria University, Australia.

Research procedures. The project investigator, Erica Myers-Davis will discuss for approximately 60 minutes with you about your experiences concerning social enterprises. The interviews may take the form of a dialogue or conversation. The investigator will take notes of the conversation either by hand or on a computer. She will only audio record the conversation, if participants agree to the audio recordings.

The risks and benefits of participating in the research. The only risks in this research are the possibility of public identification of participants. To minimize this risk, I will not publish the name of any individual or organisation unless the organisation and individuals who have participated in interviews, specifically request it. I will not publish any name/s unless you specifically request it. The researcher will discuss with you any details around anonymity and access to draft publications at the time of the interview.

Although you may not directly benefit from this research, the research will assist to gain better understanding about the quality of life for people experiencing physical, economic or social challenges, and about any successful strategies used by social enterprises in Jamaica to improve how their lives at work and outside of work may be addressed. This may benefit participant workers in general. I will share and discuss this information with any participant who wishes to have it, and who may find it interesting and useful.

How this research will be used. With your permission I would like to audio-record the interviews, and take photographs of, their workplaces or organisations (such as social enterprises) and their artefacts (such as banners/publicity posters). The audio-recordings will be stored on my computer. Participant names will not be included on the record of the interview, but the interview will be coded, to differentiate it with other interviews, and in case I want to check something with you. Computer files, including recordings, transcripts or digital photographs, will be kept on password-protected computers in locked offices and kept for seven years, after which they will be deleted.

Any transcripts of interviews, or photos which are printed on paper will be stored in locked cabinets. I will keep this data for seven years, after which time it will be destroyed by shredding. If at any time you decide you would like the record of interview to be destroyed, then you should let me know and I will make sure that all copies of the record of interview are destroyed. I am also happy to provide you with a copy of the transcript of your interview, findings and any publications, if you would like to receive any of these.

How will the information collected be used?

The audio recordings will be transcribed and then written up, what I learn from the interviews and discussions and, after discussing it with people from your organisation/yourself, this information will be published in academic journals and books.

If you wish to withdraw your participation. Any participating individual or organisation may withdraw at any time. There are no disadvantages, penalties or adverse consequences for not participating or for withdrawing from the research. You have the right to demand that data arising from your participation is not used in the research project provided that this right is exercised within four weeks of the completion of your participation in the project. You are asked to notify the investigator by e-mail or telephone that you wish to withdraw your consent for your data to be used in this research project.

Each participant will be asked if they would be willing to have this material used in public materials such as scholarly publications and will be informed that they are free to withdraw their consent for the use of their personal quotations, narratives or photos at any time up until the point at which publications have been finalised.

If you have any questions or complaints. Any questions regarding this project may be directed to the Investigator, Erica Myers-Davis the College of Business, on telephone number +61 450 425 536 or by email: erica.myers-davis@live.vu.edu.au.

The Chief Investigators and supervisors of this project are:

Mr Richard Gough +61 9919 4640 richard.gough@vu.edu.au

Dr Annie Delaney +61 9919 9487 annie.delaney@vu.edu.au

If you have any complaints or concerns that the investigator has not been able to answer to your satisfaction, you may contact the Secretary for the Human Research Ethics Committee, Office for Research. Email: researchethics@vu.edu.au

Appendix 3 Victoria University Ethics Committee approved formal written consent form

CONSENT FORM FOR PARTICIPANTS INVOLVED IN RESEARCH

INFORMATION TO PARTICIPANTS:

We would like to invite you to be a part of a study examining quality of life experienced by people that work within social enterprises in Jamaica. The project seeks to better understand the factors that may enhance and improve workers' experiences within the social enterprise they are employed at as well as their life outside of work, such as at home and in the community.

This project is being conducted by a student researcher Erica Myers-Davis as part of a Professional Doctorate Program at Victoria University under the supervision of Mr Richard Gough and Dr Annie Delaney from the College of Business.

The project investigator, Erica Myers-Davis will discuss for approximately 60 minutes with you about your experiences concerning social enterprises. The interviews may take the form of a dialogue or conversation. She will take notes of the conversation either by hand or on a computer. She will only audio record the conversation, and only if you agree to it being recorded.

The only risks in this research are the possibility of public identification of participants. To minimize this risk, Erica will not publish the name of any individual or organisation unless the organisation and individuals, who have participated in interviews, specifically request it. Erica will discuss with you any details around anonymity and access to draft publications at the time of the interview.

CERTIFICATION BY SUBJECT

I, (your name) …….

of (your town)……

certify that I am at least 18 years old* and that I am voluntarily giving my consent to participate in the study:

***'Quality of work life on participant workers employed in social enterprises in Jamaica and its impact on experiences of social inclusion'* being conducted at Victoria University by: Ms Erica Myers-Davis under the supervision of Mr Richard Gough and Dr Annie Delaney**

I certify that the objectives of the study, together with any risks and safeguards associated with the procedures listed hereunder to be carried out in the research, have been fully explained to me by:

Erica Myers-Davis, student researcher

and that I freely consent to participation involving the below mentioned procedures:

- Answering questions about my experiences concerning social enterprises

I certify that I have had the opportunity to have any questions answered and that I understand that I can withdraw from this study at any time and that this withdrawal will not jeopardise me in any way.

I have been informed that the information I provide will be kept confidential.

Signed:

Date:

Any queries about your participation in this project may be directed to the researcher

Mr Richard Gough (03) 9919 4640 or email richard.gough@vu.edu.au

Dr Annie Delaney (03) 9919 9487 or email annie.delaney@vu.edu.au

Ms Erica Myers-Davis 0450 156515 or email erica@.myersdavis@live.vu.edu.au

If you have any queries or complaints about the way you have been treated, you may contact the Ethics Secretary, Victoria University Human Research Ethics Committee, Office for Research, Victoria University, PO Box 14428, Melbourne, VIC, 8001, email Researchethics@vu.edu.au or phone (03) 9919 4781 or 4461.

[*please note: Where the participant/s are aged under 18, separate parental consent is required; where the participant/s are unable to answer for themselves due to mental illness or disability, parental or guardian consent may be required.]

Appendix 4 Victoria University Ethics Committee approved consent form to make audio recordings and take photographs

Consent Form

Project Title: Quality of work life on participant workers employed in social enterprises in Jamaica and its impact on experiences of social inclusion

I (the participant) have read (or, where appropriate, have had read to me) and understood the participant information statement and consent form, and any questions I have asked have been answered to my satisfaction. I understand that even though I agree to be involved in this project, I can withdraw from the study at any time, up to four weeks following the completion of my participation in the research. Further, in withdrawing from the study, I can request that no information from my involvement be used. I agree that research data provided by me or with my permission during the project may be included in a thesis, presented at conferences and published in journals on the condition that neither my name nor any other identifying information is used.

The investigator, Erica Myers-Davis may take and use audio-recordings as described in the information statement.

Please tick one box: YES ☐ NO ☐

In my role as _____, I consent that the investigator, Erica Myers-Davis may take and use photographs of my organisation/workplace, including machinery, banners, posters or any other organizational artefacts, as described in the information statement.

Please tick one box: YES ☐ NO ☐

Name of Participant (block letters):_____

Signature: _____   Date:_____

Name of Investigator (block letters): <u>Erica Myers-Davis</u>

Signature: _____   Date:_____

Appendix 5 Victoria University Ethics Committee approved interview questions for worker research participants

Interview Schedule – Social Enterprise Worker Participants

Statement about the research

This research project is a case study of social enterprises in Jamaica. The project seeks to examine and identify the factors that contribute to quality of work life of participant workers employed in social enterprises and to better understand the way in which work in social enterprises can be arranged to improve social inclusion of participant workers.

i. Ask the interviewee to confirm the relevant consent on tape (the statement has been explained, the interviewee consents to audiotape, and the nature of the agreement re use of the transcript).

ii. Interviews will be semi-structured. These questions will form the starting point for the interview, but the researcher will use reflective listening and other interview techniques to encourage research participants to provide more detailed answers and to explore other issues which arise during the course of the interview.

iii. Clarify how the interviewee would like to be referred to.

iv. Confirm if they would like to receive a copy of the transcript.

Interviewee details:

Male/female:

Age band (21-25, 25-30, 30-35, 35-40, 40-45, >45):

Code for this interviewee:

Questions:

1. Interviewee's background

At what age did you finish school?

Can you tell me about your work at the social enterprise?

How did you come to do this kind of work?

For how long have you been doing this kind of work? Do you have any past experience in this type of work?

Have you worked for other social enterprises before working with [name of organisation]? If so, could you tell me about what that work involved?

Have you worked for any other companies before working with [name of organisation]? If so, could you tell me about what that work involved?

What is your role with org? What responsibilities do you have in that role?

During your time working with [org], have you worked in other roles? If so, can you tell me what responsibilities you had in those roles?

How did you find out about the opportunity to work at this social enterprise?

Did you have to meet any special criteria to work here?

Tell me about a typical day at work.

2. Participation and Decision making

Are you involved in any part of the running of the enterprise?

Are you involved in deciding what type of products or services should be made or sold?

Are you involved in deciding what prices should be charged to customers?

Have you participated in any meetings to discuss any new services or products? How the business operates? Any problems with the work?

How is work distributed or decided?

3. Relationships

Who is the leader of the organisation?

Who is your supervisor?

How would you describe your relationship with your supervisor?

How many other people work directly with you?

Do people continue to work at this workplace for a long time or is there a high turnover?

How would you describe your relationship with your co-workers?

4. Workplace Accommodations & Job Requirements

Did you already have the skills to perform your job?

Are there any aspects of your job that you find difficult? Or found difficult in the past?

Did the organisation need to make any changes for you, either in the tasks, hours or in the workplace to make the job easier for you to do?

What aspects of your work do you enjoy the most?

What aspects of your work are the easiest?

5. Wages & Benefits

How much are you paid?

Do you receive any other benefits working here? Eg, do you get discounted or free products, free training etc.

6. Impact

What difference has working here made to your life?

What would you be doing if you didn't have this job?

Before you had this job, what opportunities were available to you? In the areas of employment, society, family and friends.

What opportunities do you believe are available to you now? In the areas of employment, society, family and friends.

What are the reasons you choose to work here?

What has surprised you about working here?

7. Government, Business, Education, Church and NGOs

If you were in government, what would you do to improve the situation of workers whose only employment option is within a social enterprise?

What role do you think business could play in social enterprises? What role are they playing now?

What role do you think educational institutions are playing now? What role could they play in the future?

What about churches and NGOs, what role do they play now in social enterprises? What role could they play?

8. Anything else?

Is there anything else you would like to tell me about your experiences here at the organisation.

Appendix 6 Victoria University Ethics Committee approved interview questions for funder research participants

Interview Schedule – Funder Participants

Statement about the research

This research project is a case study of social enterprises in Jamaica. The project seeks to examine and identify the factors that contribute to quality of work life of participant workers employed in social enterprises and to better understand the way in which work in social enterprises can be arranged to improve social inclusion of participant workers.

i. Ask the interviewee to confirm the relevant consent on tape (the statement has been explained, the interviewee consents to audiotape, and the nature of the agreement re use of the transcript).

ii. Interviews will be semi-structured. These questions will form the starting point for the interview, but the researcher will use reflective listening and other interview techniques to encourage research participants to provide more detailed answers and to explore other issues which arise during the course of the interview.

iii. Clarify how the interviewee would like to be referred to.

iv. Confirm if they would like to receive a copy of the transcript.

Interviewee details:

Male/female:

Age band (21-25, 25-30, 30-35, 35-40, 40-45, >45):

Code for this interviewee:

Questions:

1. Interviewee's background

Can you tell me about your work?

How did you come to do this kind of work?

For how long have you been doing this kind of work?

Have you worked for other organisations that have funded social enterprises before working with [name of organisation]? If so, could you tell me about what that work involved?

2. Experience working with organisation?

 For how long have you been working with your organisation?

What is your role with org? What responsibilities do you have in that role?

During your time working with [org], have you worked in other roles? If so, can you tell me what responsibilities you had in those roles?

3. Funding

Tell me about the how your organisation first became involved in funding social enterprises.

As a funder of these social enterprises what is your organisation's role with the social enterprises? Your own role?

How do you find social enterprises that are looking for funding?

When assessing a social enterprise what are the criteria that you examine to assess its effectiveness, efficiency? What are the key measures that you use?

How do you evaluate the impact of your funding? On social enterprise? On the individual participant workers?

What difference will your funding make to these organisations?

What do you expect see once the funding has finished?

Are there any unexpected things that you have encountered?

Tell me about the funding agreements between your organisation and a social enterprise, are there any milestones or specific outcomes that they must meet etc. Length of agreement etc.

What role do the stakeholders of the social enterprise play in designing or participating in the funding agreements?

How do you get updates on their progress? Meetings, emails etc?

What are the benefits to your organisation in funding a social enterprise?

Does your organisation receive a tax deduction or rebate from the government for grants made to social enterprises?

Anything else you would like share on the funding side?

4. Participant Workers

Do you have any contact with participant workers at the social enterprises?

What sort challenges do you believe the participants are experiencing?

What changes, if any, have you seen in the participants since they have started working in the social enterprises?

What differences, if any, have participants told you working in the social enterprise has made to them?

Overall what benefits do you believe individuals experience when they work at a social enterprise? In the workplace? Outside the workplace?

If social enterprises didn't exist what do you think would happen to participants? Where would they be? What would they be doing?

5. Social Enterprise

How does a social enterprise differ to a traditional business?

What in your view, makes a successful social enterprise?

What lessons can social enterprises teach charities and non-profit organisations that provide support to a similar cohort?

6. The Community

What is the role of social enterprises in the local community?

 What support can the local community give to social enterprises?

How do you think the community views your support of social enterprises?

7. Government, Business, Education, Church and NGOs

What is the role of government in social enterprises?

If you were in government, what would you do to improve the situation of workers whose only employment option is within a social enterprise?

What other organisations are involved with the social enterprises?

What role do you think business could play in social enterprises? What role are they playing now?

What role do you think educational institutions are playing now? What role could they play in the future?

What about churches and NGOs, what role do they play now in social enterprises? What role could they play?

8. Anything else?

Is there anything else you would like to tell me about social enterprises in Jamaica?

Appendix 7 Victoria University Ethics Committee approved interview questions for social enterprise management research participants

Interview Schedule – Social Enterprise Management Participants

Statement about the research

This research project is a case study of social enterprises in Jamaica. The project seeks to examine and identify the factors that contribute to quality of work life of participant workers employed in social enterprises and to better understand the way in which work in social enterprises can be arranged to improve social inclusion of participant workers.

Ask the interviewee to confirm the relevant consent on tape (the statement has been explained, the interviewee consents to audiotape, and the nature of the agreement re use of the transcript).

ii. Interviews will be semi-structured. These questions will form the starting point for the interview, but the researcher will use reflective listening and other interview techniques to encourage research participants to provide more detailed answers and to explore other issues which arise during the course of the interview.

iii. Clarify how the interviewee would like to be referred to.

iv. Confirm if they would like to receive a copy of the transcript.

Interviewee details:

Male/female:

Age band (21-25, 25-30, 30-35, 35-40, 40-45, >45):

Code for this interviewee:

Questions:

1. Interviewee's background

Can you tell me about your work?

How did you come to do this kind of work?

For how long have you been doing this kind of work?

Have you worked for other social enterprises before working with [name of organisation]? If so, could you tell me about what that work involved?

2. Experience working with organisation?

For how long have you been working with your organisation?

What is your role with org? What responsibilities do you have in that role?

During your time working with [org], have you worked in other roles? If so, can you tell me what responsibilities you had in those roles?

3. Foundation

Tell me about the how your organisation was founded; what were the reasons for its establishment. Who decided to establish it.

What was the organisation's mission and purpose when it started? Has this changed?

Are the founders still involved?

What is the business structure/legal entity of the organisation? Sole trader, partnership, limited company etc

Does the organisation have a charitable status? Income tax or other tax exemptions? Gift deductibility for donations?

4. Operations

Tell me how your organisation operates.

What are the roles within the organisation?

Who is the leader of the organisation? What are their experience and skills?

How are organisational decisions made? Board of directors, co-operative etc

How many participant workers are there? Other employees?

Can you tell me the process for employing participant workers? Other employees? Must they meet any criteria?

What is the average length of service of participant workers? Other employees?

What role do participant workers play in designing programs, services, products?

5. Finance

How does the organisation generate income?

What percentage is via sales income, government funding, philanthropic grants etc?

Do any of your funding agreements come with clauses or obligations?

How is this income expended?

What is the biggest expense?

Does the organisation make a profit?

What criteria do you use to assess your efficiency? What are the key performance indicators that you use?

Do participant workers need to or choose to financially contribute to the social enterprise?

6. Impact

What criteria do you use to assess your effectiveness? What are the key performance indicators that you use?

How do you evaluate the impact of the organisation on participant workers?

What difference do you make to these individuals? Take me through a typical participant worker's experience working here.

Are there any unexpected things that you have encountered?

Do you provide any reports to funders? On impact? Financial milestones?

Anything else you would like share on your impact?

7. Participant Workers

How often do you have contact with participant workers at the social enterprises?

What sort challenges do you believe participants are experiencing before they come to work at the social enterprises?

Do you make allowances or special provisions for these challenges in your workplace? If so, please describe?

What does your organisation offer that a job in a mainstream organisation doesn't?

How does your participant worker's job compare to a similar role in a mainstream business?

What changes, if any, have you seen in the participants since they have sorted working in the social enterprises?

What differences, if any, have participants told you working in the social enterprise has made to them? In the workplace? Outside the workplace?

Overall what benefits do you believe individuals experience when they work at a social enterprise? In the workplace? Outside the workplace?

What do you believe are the main reasons participant workers choose to work here?

If social enterprises didn't exist what do you think would happen to participants? Where would they be? What would they be doing?

If this social enterprise didn't exist what sort of work would you be doing?

After working at your organisation, do you think your workers would be able to work in a mainstream business?

5. Social Enterprise

How does your social enterprise differ to a traditional business?

Do you believe your social enterprise is successful?

What lessons can your social enterprises teach charities and non-profit organisations that provide support to your cohort?

6. The Community

What is the role of your social enterprise in the local community?

 What support can your local community give to your organisation?

How do you think the community views your organisation?

7. Government, Business, Education, Church and NGOs

More broadly, what is the role of government in social enterprises?

If you were in government, what would you do to improve the situation of workers whose only employment option is within a social enterprise?

What other organisations are involved with the social enterprises?

What role do you think business could play in social enterprises? What role are they playing now?

What role do you think educational institutions are playing now? What role could they play in the future?

What about churches and NGOs, what role do they play now in social enterprises? What role could they play?

8. Anything else?

Is there anything else you would like to tell me about social enterprises in Jamaica

Appendix 8 Observation Protocol

At Social Enterprises

DESCRIPTIVE NOTES	REFLECTIVE NOTES
Physical setting and location	Easy to find? Busy or quiet location. Old or new building
Room layout, décor, furniture. If appropriate sketch room layout	Furnishings old, contemporary, new, etc open, locked doors, easy to navigate, or need to be guided
Note who is present	Note where participant(s) sit/located in relation to each other and researcher. If appropriate sketch where participants are located in the space.
Note presence of others who are not being interviewed or participating in this study	If there are others, what are they doing? How are they related to the participant(s)?
What activities are happening? Who is leading the activity? Are people working on their own?	How are people feeling about these activities? How are they talking to each other? Are there any noticeable cliques or power dynamics?
How do they interact with the researcher?	Level of anxiety/happiness of participant(s) Are they welcoming, shy, nervous etc?

Appendix 9 Models

These models were designed after the analysis of the data, they highlight the themes that emerged and the connections between those themes.

Power emerged as a major theme from the data in a variety of ways as highlighted from the models.

1. The power structure in Jamaica appears to underpin and influence attitudes, education system and civil society.

2. Who holds power and exerts control emerged as a theme in impoverished garrison communities run by gangsters. This models shows that:
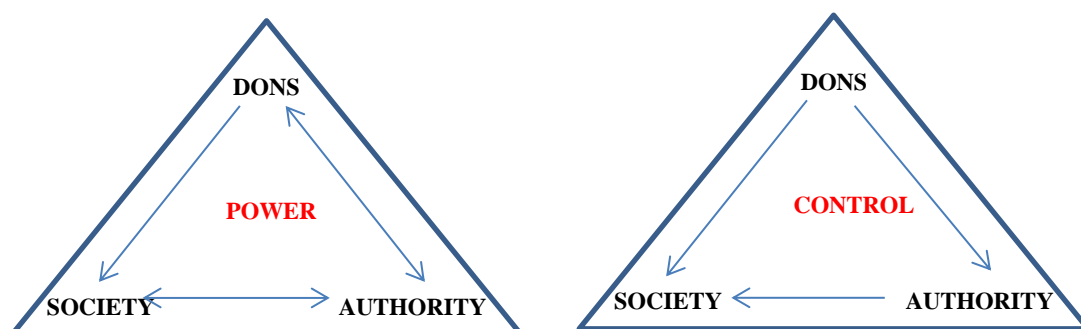Criminal Dons have power and control over Society.
Dons have power and control over Authority.
Authority has power but no control over Dons.
Authority has power over Society but some control over Society.
Society has power but no control over Authority.
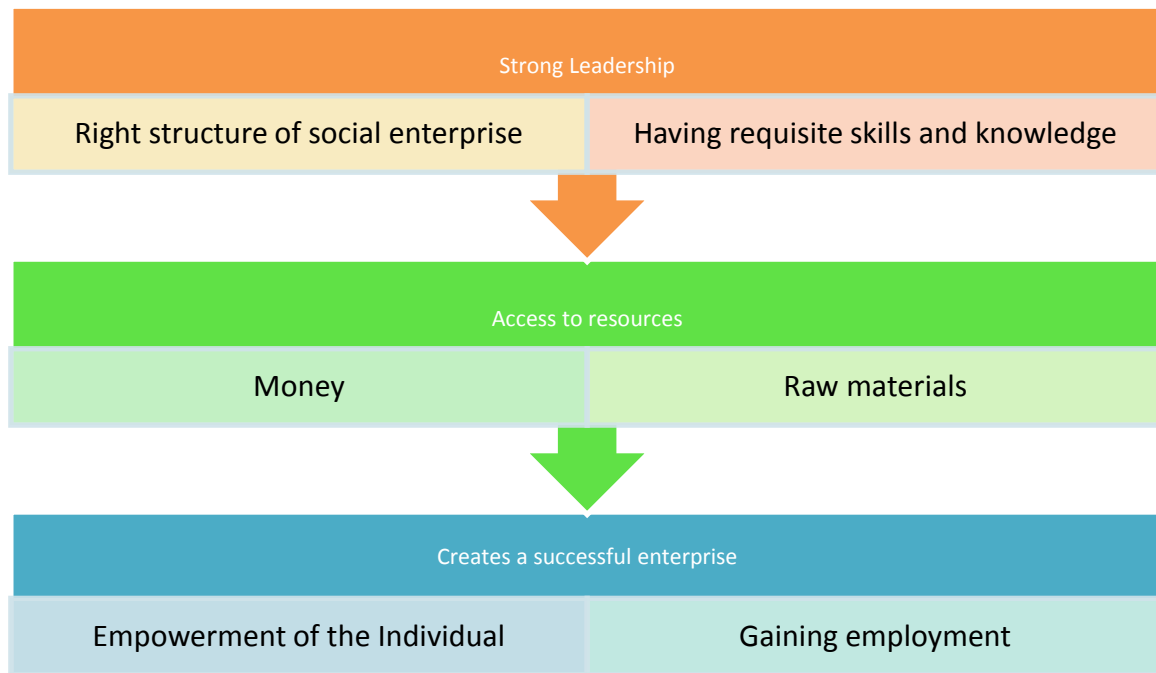Society has no power or control over Dons.

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3. The power that having or not having money was another theme that emerged. Access to or lack of financial resources impacted everything at the social enterprises:

- the ability to run the business operations effectively;
- relationships with stakeholders
- attitudes towards participant workers, their capabilities and capacities;
- the power dynamics, who holds the power, the customer, funder, etc (it affects the participant worker's ability to to speak up inside and outside the social enterprise,.
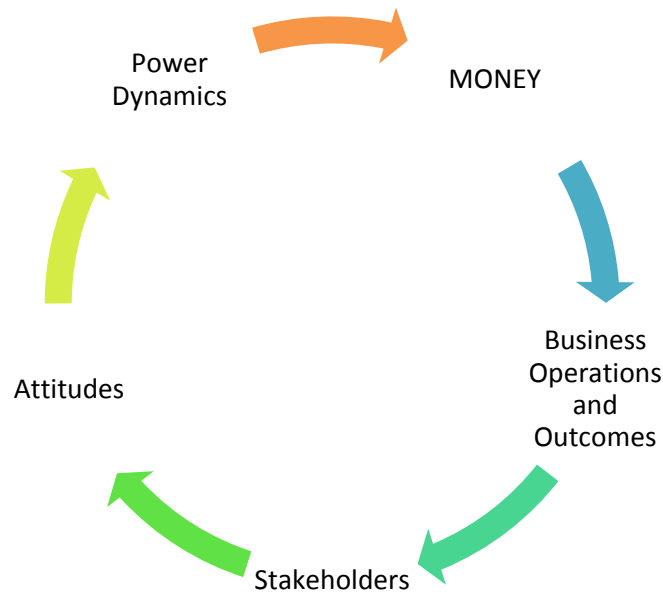
4. Government stakeholders provided an insight into what makes a successful social enterprise and how as stakeholders they saw their role as one of empowerment of the individual participant worker.
However what is missing from this model below, is the impact of structural exclusion and follows an access (neoliberal) ideology. The stakeholders do not view themselves as potentially creating barriers or being exclusionary agents.

Strong Leadership	
Right structure of social enterprise	Having requisite skills and knowledge

Access to resources	
Money	Raw materials

Creates a successful enterprise	
Empowerment of the Individual	Gaining employment

5. Government and two generations hold and control the most power – Baby Boomers and the Silent Generation. They are the most stubborn, resistant to change, they also have colonialised mindsets, given they were born pre-1962 and experienced life under colonial rule. They follow the rules and expect younger generations to do so – they are all running boards, companies and in government positions. .Generations X, Y, Z are the most disempowered. There is conflict as there are Five generations living in the same space.

The third sector emerges as a form of resistance to the oppression experienced by the enslaved Africans, young people, women, the impoverished and disabled. The third sector creates community interventions which bring an improvement to the quality of life. One expression of the third sector is the social enterprise which promotes and encourages entrepreneurial behaviour, that can create sustainable income and lead to self-empowerment.

HOLDERS OF MOST POWER

Silent Generation, Baby Boomers and Government

- Slavery
- Youth
- Women
- Disabled
- Impoverished

Resistance

Third Sector

- Community interventions
- Improvement in quality of life

- Entrepreneurial behaviour
- Creating sustainable income
- Self-empowerment

Social Enterprise

DISEMPOWERED

Generations X, Y and Z

Women