

An Introduction to Research Justice

"DataCenter offered us expertise in research while respecting the leadership, vision and social justice values of our membership. Together we were able to produce research that surpassed our own expectations."

Together we were able to produce research that surpassed our own expectations."

— Ai-jen Poo, Director,
National Domestic Workers Alliance

CULTURAL
SPIRITUAL
KNOWLEDGE

MAINSTREAM
KNOWLEDGE

EXPERIENTIAL
KNOWLEDGE



A free, popular education toolkit
for community organizations
working towards social justice.



DataCenter
RESEARCH FOR JUSTICE
1904 Franklin Street, Ste. 900
Oakland, CA 94612 USA
Tel: +1 (510) 835-4692
datacenter.org

For the latest in Research Justice, join us:



YOUTUBE
youtube.com/researchjustice



E-NEWSLETTER
datacenter.org/subscribe



FACEBOOK
facebook.com/researchjustice



DONATE
datacenter.org/give

Acknowledgements

Funders:

The production of this toolkit was generously funded by the General Services Foundation and Open Society Foundations.

Authors/Contributors:*

Reem Assil, Miho Kim, Saba Waheed

*We would also like to thank current and former staff who contributed to the content that inspired this toolkit: Michael James, Christina Fletes, and many interns and volunteers.

Peer Reviewers (in alphabetical order):

Marie Choi, Celia Davis, Jay Donahue, Andrea Fritsch, Darwin Graham, David Jaber, Zachary Norris, Mara Ortenburger, Rachel Pfeffer, Christine Schweidler, Mai Thai

Editors:

Julian Marszaleck, Jenna Portnoff

Design and Layout:

Bill Hogan (layout), Rini Templeton (illustrations)

Community Partners:

DataCenter would like to acknowledge the role that our community partners, past and present, have played in helping to develop the Research Justice vision as well as providing us a medium through which to hone and improve our trainings. Your participation, feedback, and shared analysis have been invaluable.

Thank you!



2013, Creative Commons License:

An Organizer's Guide to Research Justice by DataCenter is licensed under the Creative Commons Attribution-ShareAlike 3.0 Unported License. To view a copy of this license, visit creativecommons.org/licenses/by-sa/3.0/.



Table Of Contents

Introduction to DataCenter

About DataCenter	1
DataCenter Services	2
DataCenter's Community Partners	3

Preface

Using this Toolkit	4
Tips for Users	4
Assumptions	4
Key Concepts	5

CHAPTER 1. Inside Research Justice

What is Research Justice?	6-7
Origins of Research Justice	8
Achieving Research Justice	9-10
Case Study: National Domestic Workers Alliance	11-12
Research Justice Workshops:	13
• We are the Experts	14-18
• Inside Research Justice: Knowledge Factory	19-24

CHAPTER 2. Research and Organizing

How Does Participatory Research Support Organizing?	25
Research for Action	26
Using Research to Support Organizing	27-28
Research and Organizing Workshop:	29
• Research for Organizing	30-31

CHAPTER 3. Research Methods

Research Methodology: The Crock Pot Analogy	32-34
Research Planning 101	34-39
Why Methodology Matters for Organizing	40-42
Research Methods Workshops:	43
• Understanding Participatory Research Methods	44-46
• Creating Your Research Plan	47-50


Resources	51-53
-----------------	-------


Appendix	54
----------------	----

Section A: Knowledge Factory Images (16 images)
 Section B: Stepping Stone Cards (11 cards)
 Section C: Icon Key

Introduction to DataCenter

About DataCenter

 **Research Justice** is a strategic framework that seeks to transform structural inequities in research. It centralizes community voices and leadership in an effort to facilitate genuine, lasting social change. Chapter 1 of this toolkit demystifies the concept of Research Justice.

 We know that expertise is widely distributed — even if ‘legitimacy’ is not.”

—Dr. Michelle Fine,
professor at City
University of New York
(CUNY) and founder of
Public Science Project

DataCenter is a national training and resource center that supports grassroots organizing for justice by building communities’ capacity to reclaim, own, and use knowledge to advance social change. We use research to help move the knowledge and solutions of communities of color and the poor from the margins to the center of decision-making. We advocate for **Research Justice** to challenge the dominant paradigm that places barriers to communities’ ability to access and produce knowledge.

DataCenter began the journey towards Research Justice ten years ago with our partners Domestic Workers United in New York City. In 2009, DataCenter coined the term ‘Research Justice’ to define our vision for research in, by, and for grassroots communities for social change. Research Justice operates on a key assumption: that communities have expert knowledge on both the conditions they face and the solutions they need.

Through our strategic research partnerships, capacity-building, training and advocacy, we have supported numerous organizations to use Research Justice to leverage and win campaigns. Some examples include:

- ✓ Passing the first-ever statewide Bill of Rights for domestic workers in New York and California;
- ✓ Launching a statewide campaign platform by Long Beach Khmer Girls;
- ✓ Supporting low-income youth to win free bus passes in San Francisco;
- ✓ Helping form the Food Chain Workers Alliance and produce a national report to launch their campaign;
- ✓ Forming a compilation of knowledge about sacred sites and their significance for cultural preservation within an indigenous community;

This toolkit is the product of feedback and first-hand experiences from hundreds of community members, organizers, and leaders. It’s intended to share with you what an approach to Research Justice can look like.

DataCenter Services

DataCenter provides research capacity-building through partnerships, trainings, and consultation.

Partnerships

We work as an active research partner with community-based organizations, academic institutions, foundations, and government entities to forge strategic campaigns. We are uniquely positioned to provide essential research capacity and strengthen relationships between community organizations and allies towards a long-term vision for social change.

Trainings

We provide interactive, popular-education-style trainings in the areas of research strategy, design, and methodology. We provide special trainings such as an annual Research Justice Academy and create toolkits for our partners to carry out strategic research in their campaigns. We also provide tailored trainings and curriculum to meet the needs of your organization.

Consultation

We provide specialized consultation services to groups in need of specific trainings and/or resources. Our consultation services include technical assistance in the following areas:

- ✓ Campaign planning;
- ✓ Strategy formulation;
- ✓ Training and logistical support in participatory research methods;
- ✓ Discreet research such as literature reviews and target research;
- ✓ Data analysis;
- ✓ Data dissemination;

If you are interested in more DataCenter resources, please contact us.

Web: datacenter.org

Phone: 510-835-4692

Email: info@datacenter.org

DataCenter Community Partners

The following is a select list of DataCenter’s recent community partners. They may be able to offer key insights for your campaigns. We’ll be documenting and sharing lessons and their feedback, so be sure to sign up for our mailing list — datacenter.org/subscribe.

Food Chain Workers Alliance (FCWA)

foodchainworkers.org

Justice for Families (J4F)

justice4families.org

National Domestic Workers Alliance (NDWA)

domesticworkers.org

Restaurant Opportunities Centers United (ROC United)

roc.org

Right to the City (RTTC) Alliance

righttothecity.org

Preface

Using this Toolkit

An Introduction to Research Justice is intended for community organizers to apply tools and concepts of Research Justice to organizing. This toolkit encourages marginalized communities to recognize their own expertise and to develop their own analysis of the issues that impact them.

We hope readers use this toolkit to spark their own conversations about community-driven research strategies. In each section we have included sample workshops from our Research Justice Training Program as suggested guides for these discussions.

Please contact us if you would like to secure an experienced DataCenter trainer to facilitate the workshops — info@datacenter.org.

Tips for Users

- ✓ Be creative! Workshops are flexible and can be tailored to your organizational needs. Find ways to present the concepts included here that your community will connect with.
- ✓ If you find the script for a workshop is too basic, we encourage you to utilize the descriptive content of the coinciding section to supplement your training.
- ✓ All workshops have suggested times based on an average of 8-10 participants. Adjust the time accordingly based on the number of people you are working with.
- ✓ Icon Keys are included at the beginning of each workshop section and explain the different symbols used throughout this toolkit. You can also find an Icon Key at the end of this toolkit (see Appendix, Section C).

Assumptions

- ✓ This toolkit assumes grassroots leadership development is a core commitment of your organization and membership.
- ✓ This toolkit is intended for a group of people to establish collective readiness to undertake a transformative journey of co-learning to build power via community-driven research projects and organizing.
- ✓ The sample workshops include step-by-step instructions for facilitators to use in their own trainings and community strategizing sessions. However, technical instructions never compensate for facilitative skills such as group dynamic management, process engagement, and cultural competency. *You* are the expert of your community. Contact us for help on appropriate adaptation of these materials.

Key Concepts

We hope that by reading this toolkit, you will be able to engage others about the following:

Redefining “Research” and “Expertise:”

Research, simply put, is the methodical, coordinated process of investigating and learning for a particular purpose. An important part of the path to Research Justice is debunking the myth that expertise is limited to formal education, or that research is a skill reserved for the advantaged few.

People use research methods in their daily lives to acquire knowledge to improve their lives. They have expertise in both the problems they face *and* the solutions they need. This toolkit helps readers engage communities to recognize their own expertise.

Building Legitimacy of Community Knowledge:

We believe that no research is completely free of an agenda, nor is it ever purely ‘objective.’ ‘Legitimate’ research can and does often lead to problematic conclusions, particularly when it comes to marginalized communities.

Research allows us to craft and manipulate political legitimacy based on *our* knowledge and *our* voice — which, ultimately, allows us to reclaim our power and achieve self-determination.

Understanding the Role of Research Institutions:

There is an unlevel playing field between grassroots organizations and mainstream research institutions in terms of access to resources. Leveling the playing field, in which community organizations are recognized as legitimate partners in research, creates more holistic and robust research.

Research that reflects meaningful collaboration between academics, advocates, service providers, and impacted communities leads to more effective policy solutions and stronger movements. This toolkit explores research methods that involve collaboration between research institutions and grassroots organizations.

Send us Feedback

All DataCenter’s toolkits are ‘living’ documents — they’re always being added to and improved upon. Please let us know if you have any suggestions on how to make this toolkit more accessible, informative, and/or accurate. Your feedback is greatly appreciated!



Chapter 1

Inside Research Justice

What is Research Justice?

The concept of Research Justice begins with a single question: Who defines and controls knowledge production? Politically dominant institutions are not only dominant in policymaking, they are also dominant in the knowledge production that informs policymaking.

There is an inequity in the way research is practiced in the world. Community knowledge and people's direct experiences with day-to-day injustices get dismissed by decision makers. Yet, knowledge produced by mainstream institutions through scientific means is often seen as legitimate, regardless of whether it reflects the community's truths and realities.

As a result, traditionally marginalized groups — such as poor communities of color and indigenous communities — experience challenges when confronting power structures to achieve institutional change. Their voices are silenced and their access to mainstream knowledge is limited, often leaving people disempowered and unable to recognize their own expertise in the problems facing their community. At DataCenter, we call this 'research oppression.'

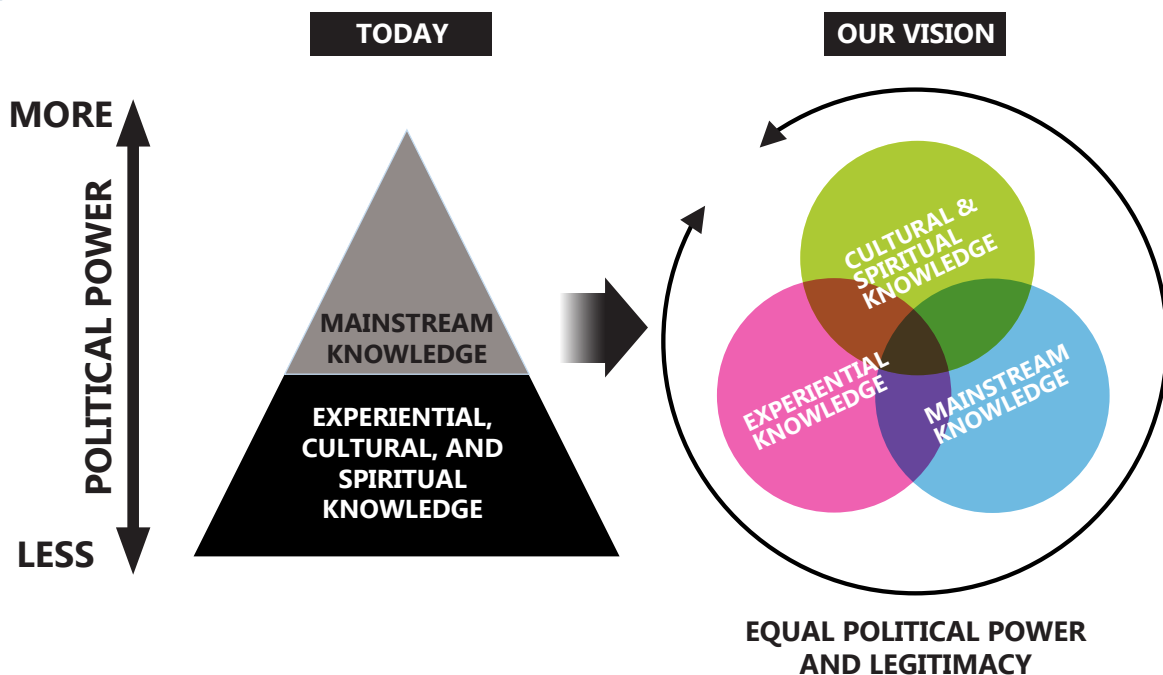
Here are just some of the many ways we experience and witness this reality which we refer to as 'research oppression' in marginalized communities.

- ✓ Little to no access to information from academic and governmental institutions because of language limitations, cost, and privatization of information;
- ✓ Little to no control over the means of their own knowledge production;
- ✓ Communities portrayed or represented negatively through biased lens;
- ✓ Community knowledge is not recognized as a legitimate source of information. Community voices are dismissed as "anecdotal" or "biased;"

To fully harness the power of Research Justice, we must heal from internalized 'research oppression' — by fully reconciling its consequences on our communities, our families, and ourselves. When people are unable to recognize their own expertise and begin to internalize dominant messages, they feel disempowered and unable to challenge power. Empowering communities to build and recognize their own expertise is an essential part of challenging research oppression. Research Justice is achieved when communities reclaim and access all forms of knowledge to affect change. The balance of power is restored between community voices and those of institutions.



DATACENTER'S RESEARCH JUSTICE VISION



Cultural & Spiritual Knowledge:

Cultural practices and wisdom passed down from our community (i.e. elders, neighbors, family, friends, etc.). This knowledge is often shared through cultural and spiritual traditions (i.e. food, celebrations, ceremonies, etc.).

Experiential Knowledge:

Lived day-to-day experience; what we learn and know from living and dealing with issues that impact our lives.

Mainstream or Institutional Knowledge:

Consists of published facts and data produced by research "professionals" usually from outside of the community (i.e. university publications, government documents, school textbooks, etc.).

Participatory research is rooted in what Brazilian popular educator **Paulo Freire** called “the educational component of the revolutionary process.” Influenced by his famous book, *Pedagogy of the Oppressed* in the late 1960’s, it was coined by Indian educator Rajesh Tandon in the early 1970’s. Initially, it involved peasants and workers who created popular education circles to advance their consciousness with research skills rooted in a problem-posing approach, analyzing the structural and systemic roots of problems in order to identify long-term solutions.

Origins of Research Justice: A Global Movement

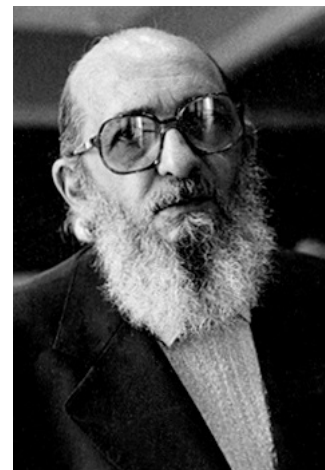
Research Justice as an explicitly social justice agenda grew out of the articulation of DataCenter’s work over the last three decades in its role as a facilitator of participatory research, sometimes referred to as **Participatory Action Research (PAR)**. Participatory research methods have been a vehicle for social movements to build people’s leadership and communities’ capacities to organize for change.

In the Global South, it has been used to resist colonialism and the exploitation of economic development institutions. Within the United States, movements such as the Civil Rights, Feminist, Anti-War and Environmental Justice Movements have engaged in participatory research to challenge dominant narratives from the power elite, which didn’t reflect the experiences of impacted communities.

Confronting institutions of power required alliances with groups that had access to mainstream sources of knowledge, such as academics, public health departments, and other governmental institutions and non-profit research entities. This posed challenges for communities to have a place to assert their own narrative and strategy for social change.

It became necessary to explicitly articulate the systemic delegitimization of grassroots organizations. In order to truly understand the root causes of problems and create lasting solutions, grassroots organizations needed to be recognized as legitimate research partners.

Research Justice became a framework to expand the conversation beyond just ensuring that research was participatory to ensuring that impacted communities are seen as legitimate partners at the decision-making table.




Paulo Freire*



Participatory research and popular education served as powerful mobilizing tools at the Highlander Folk School in Tennessee. The strategies that informed the Civil Rights movement in the 1950s are the same strategies that inform Research Justice today.

 Engaging communities in research is as much about the **process** of inquiry as it is about the outcomes. For research to be truly transformational, it must be **participatory** in both theory and practice.

 **Self-determination** in a research agenda becomes something more than a political goal. It becomes a goal of social justice, which is expressed through and across a wide range of psychological, social, cultural and economic terrains. It necessarily involves the processes of **transformation**, of **decolonization**, of **healing** and of **mobilization** as peoples.”

—Linda Tuhiwai Smith,
author of Decolonizing Methodologies, and
DataCenter advisor

Achieving Research Justice

Community-driven research challenges structural barriers to information, provides opportunities for communities to confront and reshape power structures in the research process, and leads to community-generated solutions in public policy and decision-making. This process of political engagement leads to both individual and collective transformation of consciousness.

Community-driven research:

- ✓ Synthesizes the collection and use of knowledge – research and action
- ✓ Breaks down the artificially imposed wall between researcher and researched
- ✓ Restructures power relations in the research process
- ✓ Honors the knowledge and strengths within our communities
- ✓ Furthers our struggles for justice and self-determination

Why engage in community-driven research?

It’s Strategic. Building research capacity leads to stronger organizing capacity. Community-driven research allows us to engage with our communities about the problems people face and move them to action. Building solid campaigns for change requires research that leads to effective strategy which includes our community’s investment in fighting for solutions.

It’s Transformative. To liberate ourselves we must educate ourselves. When learning and discovering is a collective process, people gather stories and see the commonalities of their conditions. Collective learning validates their experiences, affirms how much they already know, and lays a foundation for critical reflection. When we learn first-hand about the roots of our oppression, we enter a new phase of consciousness towards personal and political transformation.

It’s Revolutionary. In order for research to genuinely build a sustainable social justice movement, it must be practiced from the ground up. It must be practiced in communities. Creating systems of knowledge production that are autonomous from the existing power structures is a way of exercising self-determination.

Community-driven research must critically address the ways in which knowledge travels and influences our society. Community voices are often dismissed as anecdotal and institutional data is often hidden in proprietary databases or written in inaccessible language.

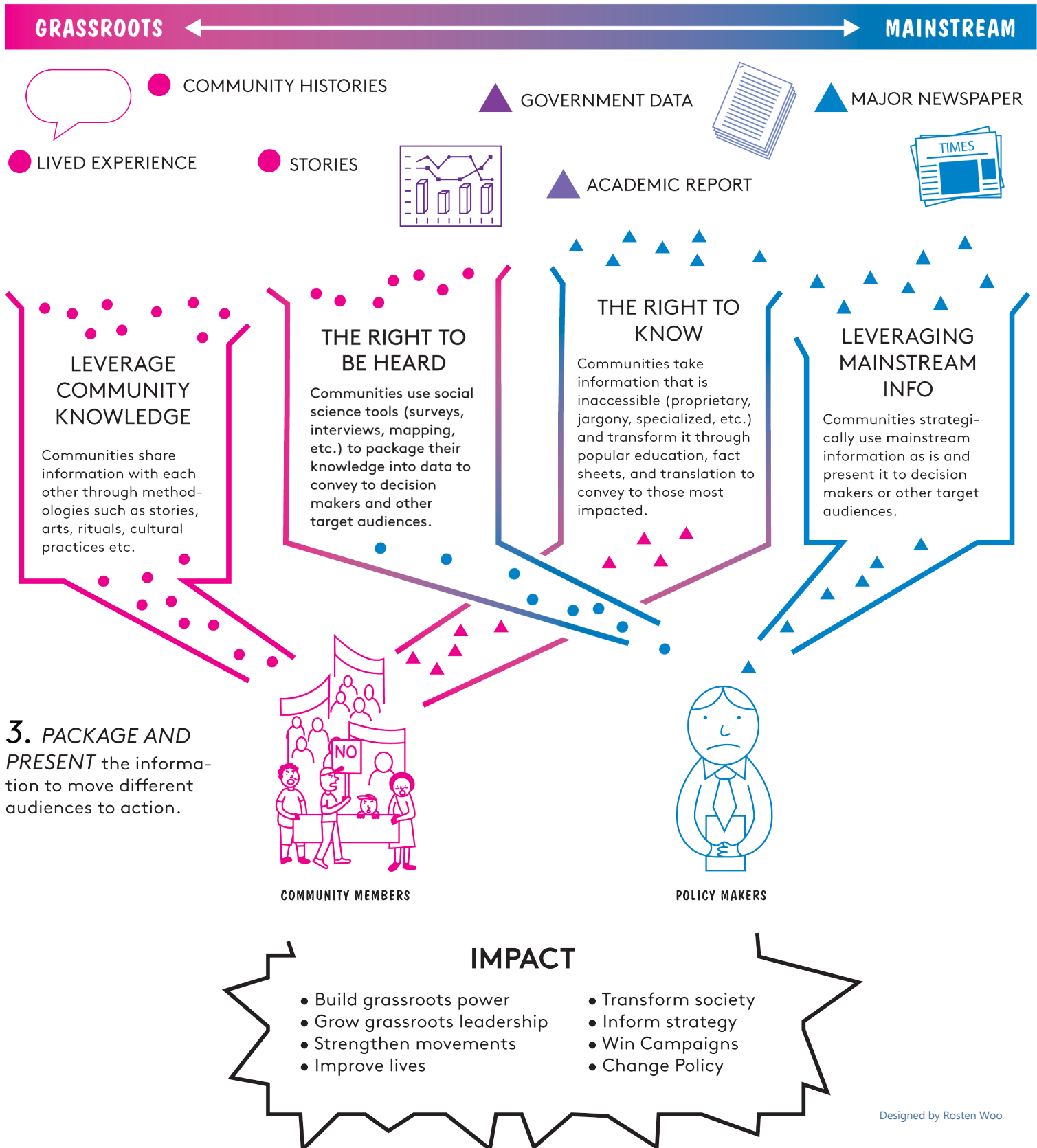
The diagram on the following page, titled *The Knowledge Factory*, demonstrates how organizers can think strategically about information — what it is, who needs to hear it, and how it needs to be packaged so it’s heard.

The Knowledge Factory:

Controlling the Means of Knowledge Production

1. IDENTIFY sources of information found all across the spectrum from grassroots to mainstream.

2. COLLECT, ASSESS, AND PROCESS information so that it tells accurate stories and gains power with its audience.



Case Study

Research Justice in Action toward a Domestic Workers' Bill of Rights

The National Domestic Workers Alliance (NDWA) consists of 39 (and counting) membership organizations of over 10,000 domestic workers in 14 states and D.C. organizing for respect, recognition, and labor standards.

Issue

Domestic workers — nannies, elder caregivers, and housekeepers — work long hours, have little job security, and have no control over living and working conditions. Domestic workers have been deliberately excluded from federal worker protection laws as a way to appeal to the Southern states when the labor regulations were created in the 1930s.

Domestic workers have historically been Black women, but the industry is now occupied by mostly immigrant women of color. They endure working conditions and wages that violate their rights as workers and as human beings because there are no clear standards for domestic employment.



Using DataCenter's Research Justice *Surveying for Social Change* method, domestic workers gather information for a domestic workers rights bill in New York.

Campaign Goals

In early 2000, domestic workers and their advocates came together to organize for their rights and dignity as workers. These were the campaign goals:

- ✓ **Establish Visibility of the Labor.** Get the public to recognize domestic work as “real work” by documenting the issues that workers face.
- ✓ **Develop Job Security and Protections.** Create federal and state laws and policies to protect domestic workers' rights, such as fair wages, benefits and working conditions.
- ✓ **Build Grassroots Worker Power.** Build a membership base of domestic workers and develop their leadership and skills to advocate for change.

Research

The US Census and other mainstream data sources fail to analyze domestic work trends because the industry is often informal and in private homes. To fill this data gap, domestic workers organized and formed an alliance. They approached DataCenter to collaboratively produce the first ever report on prac-



tices and issues within the domestic worker industry.*

Using a participatory and community-based research model, the project engaged domestic workers in all aspects of the research process. Workers and allies conducted 2,086 surveys, in nine languages, and in 14 cities. Domestic workers were surveyed at meetings, social gatherings, in playgrounds and parks, on the subway and commuter trains, and various other locations where they could be found.

Organizing

Domestic Workers United (DWU), a member of NDWA based in New York, produced a report in 2006 with DataCenter entitled *Home is Where the Work Is*. The report was key in their campaign for a Domestic Workers' Bill of Rights which amends the New York State Labor Law to ensure workers basic labor rights. They built a broad-based coalition of workers, employers, students, and faith communities to publicize the issues found in the research by bringing influential people to meetings and getting press to cover the report. The campaign involved many forms of organizing with community partners and legal allies. To maximize the visibility of their campaign, domestic workers:

- ✓ Organized actions to publicize the report including a large action at Grand Central Station, where they handed out sponges with statistics about domestic work;
- ✓ Held hearings, town hall meetings, marches, and days of action;
- ✓ Mobilized over a thousand people to the New York capital of Albany over 40 times for legislative meetings, rallies, and press conferences;
- ✓ Collected over 8,000 postcards signed by New Yorkers in support of the workers' bill of rights;

Success

In 2010, after a **six-year campaign**, New York became the first state to ensure basic labor protections for workers, affecting the state's 200,000+ domestic workers. The workers were ensured overtime pay, a minimum of one day off every seven days, three days of paid leave per year, and protections against sexual harassment and racial discrimination. There is much more work to be done to ensure their rights, but this is the first victory in ensuring protections for domestic workers who have historically been excluded from labor laws.

For more information:

National Domestic Workers Alliance: domesticworkers.org

Domestic Workers United: domesticworkersunited.org

DataCenter NDWA Page: datacenter.org/NDWA

Research Justice Workshops

The following workshops are samples of DataCenter’s extensive Research Justice curriculum. They introduce the concept of Research Justice and encourage community members and leaders to recognize their own expertise on the issues that impact their daily lives.

• We are the Experts! (pg. 14-18)

We are the Experts is an initial framing piece and icebreaker that introduces participants to the basic concepts of Research Justice. It repositions community knowledge on equal footing with dominant institutional knowledge and reaffirms that:

- a) communities *do* have critical insights into real solutions, and
- b) they can — and should — manipulate their information to create political legitimacy

• Inside Research Justice (pg. 19-24)

A set of discussions to introduce participants to DataCenter’s framework of Research Justice. This workshop includes an interactive exercise called “The Knowledge Factory” to demonstrate the way in which knowledge travels and influences our society.

This section of workshops, as with all workshops in this toolkit, makes use of the following Icon Key. For a larger version, see Section C of the Appendix.

Icon Key

This toolkit uses icons to help signify different types of information.



The Script: content that should be read aloud by the facilitator to the participants



Example Responses: typical participant responses to questions asked by the facilitator



Materials Needed: a list of all the materials that are required for an activity



Facilitator’s Note: tips provided for the facilitator. They make the toolkit easier to navigate



FYI Lightbulb: a little extra information



Quotes: a quote from a key figure in Research Justice



Handouts: a section in the toolkit that is meant to be handed out to participants

We are the Experts!

**Research Bingo and
Flower Petal of Knowledge**
30 minutes

 **ACTIVITY**

Materials

- Handout: Research Bingo
- Handout: Flower Petals of Knowledge
- Flip Chart Paper and markers
- Pens or Pencils
- Prize for Bingo Winner

Goals of Exercise

- Demystify research and redefine the notion of ‘expertise’
- Highlight research as a tool we already use in our daily lives
- Understand core attributes of various types of knowledge in our world, and the political legitimacy assigned to each type of knowledge

Agenda

1. Research Bingo.....15 minutes
2. Flower Petals of Knowledge.....15 minutes


Set up

- Put up Goals & Agenda
- Create space for people to walk around
- Make copies of Research Bingo (pg. 17) and the Flower Petals of Knowledge (pg. 18)
- Draw Flower Petals of Knowledge (pg. 18) on flip chart paper. Allow room to write in each petal.


Facilitator Instructions

1. Research Bingo (15 min)


Pass out Research Bingo Handout.

 You will go around the room and collect information to fill in the blocks on this grid. Each block has a question pertaining to people’s lives and experiences. When you find a person to whom the question is relevant, fill in their name and the answer to the question. The first person who completes three in a row (down or across) wins and must yell out “bingo!”

Allow participants to walk around and collect information. Ask the participant who yells bingo first to come up and share results of the completed row.

 There are different ways that we get information, share stories, and experience things in our lives. Why do we get information in different ways? For example, why would we go to an “elder” about certain things rather than go to city hall to find the info? Why do we speak to a community member rather than mailing out a survey?

Reaffirm that we all already take a strategic approach to getting information and using research to inform successful action and outcomes.


 Participants will need to reference their filled-out Bingo sheet for this exercise.

Summary


All of us are already thinking on a regular basis about what the best way is to get information and acquire knowledge. We understand that there are different places and different ways to get that info. Many of these categories are forms of knowledge that we have access to — which makes us experts!

Have participants hold onto their bingo sheets for the following exercise.

2. Flower Petals of Knowledge (15 min)

 So all of the things we mentioned represent different types of knowledge...


Engage participants about what kinds of knowledge go into each category. Ask participants for specific examples of each type of knowledge.

 Display the flip chart with the flower petal diagram.


 There's **community & cultural knowledge**.

-  • Elders
- Neighbors
- Friends and families
- Stories
- Songs/dances
- Ceremonies
- Festivals


 There's **experiential knowledge**.

-  • What we learn and know from our personal experiences
- Our observations of what's going on in community (environmental racism, police brutality, poverty etc.)
- What we know how to do gained through hands-on practice.

 Finally there's **mainstream & institutionalized knowledge**.



-  • What is considered “official” in society at large
- Newspapers
- University publications
- Police reports

Discussion Questions

 1. Reflect back to the Bingo game. Can you identify the type of knowledge for each square? What are characteristics of each type? For whom does each type have legitimacy? Where does this type of knowledge tend to live? In the hearts and minds of people or in libraries? What is the longevity of that knowledge?

Listen to the rationale and ensure understanding of how knowledge comes with different characteristics based on what type of knowledge it is.


Draw two columns on the flipchart. Fill in the columns with responses to the following questions


Column 1	Column 2
 2. What is the dominant perception about our people?	 3. What is the self-perception about ourselves?

Follow up by asking participants the following questions:

 4. Are the two perceptions different? How?

Encourage building the awareness, that often, stories told about them don't reflect who they are.

 5. Let's reflect on how each type of knowledge impacts us. For example, how does the mainstream perception of our communities impact us? How does our own community self-perception, what we know to be true about our community, impact us?

 6. What would be different if our truths defined society's perception of our people?

Encourage creative visioning. What could happen if their voice had the power to inform policies and practices that impact them? You can pick a specific issue for instance and ask, based on their truths, what policies might look like.

Summary

We must find ways to capture and organize our own community experience and knowledge in order to affect social change. To that end, the first step is to name and acknowledge the political leverage each type of knowledge has and be fully aware of their attributes. This will allow us to be more strategic about how to use information as a political tool.

Research Bingo!

Instruction: Go around the room and find a person that the question is relevant to, fill in their name and the answer to the question. If you get three in a row, you have 'bingo!'.

HANDOUT

Note: You can't go diagonal and you can't fill in a person's name more than once.




Have you ever...

<p>Asked a family member about your family's history?</p> <p>Name:</p> <p>What did you learn that was new?</p>	<p>Learned how to cook a dish?</p> <p>Name:</p> <p>What did you learn that was new?</p>	<p>Read an article to learn about something happening in your neighborhood?</p> <p>Name:</p> <p>What did you learn that was new?</p>
<p>Learned a skill that involves using your hands?</p> <p>Name:</p> <p>What was the skill?</p>	<p>Viewed a report about your community?</p> <p>Name:</p> <p>What did you learn that was new?</p>	<p>Discussed with your friends an issue in your community?</p> <p>Name:</p> <p>What was the issue discussed?</p>
<p>Watched the news on TV to learn about what's going on in another country?</p> <p>Name:</p> <p>What was something new you learned about the country?</p>	<p>Attended a cultural festival in your community?</p> <p>Name:</p> <p>What was something new you learned by attending?</p>	<p>Compared prices on something you wanted to buy?</p> <p>Name:</p> <p>What did you learn?</p>

Flower Petals of Knowledge

DataCenter believes that knowledge can be organized into three categories:



-  **Cultural and Spiritual Knowledge:**
Cultural practices and wisdom passed down in our community (i.e. elders, neighbors, friends, etc.). This knowledge is often shared through culture and traditions (i.e. food, dance, song, etc).
-  **Experiential Knowledge:**
Our lived, day-to-day experience; what we learn and know from living and dealing with issues that impact our lives.
-  **Mainstream Knowledge:**
Published facts and data produced by research “professionals” usually from outside of the community.

All three sets of knowledge are interconnected and form the entirety of information about an issue. Depending on your goals and who you are trying to educate, one or more forms of knowledge may be more convincing than another. But all three are necessary to achieve community-driven social change.

Inside Research Justice

40 minutes

 **ACTIVITY**

Materials

- Flip Chart Paper
- Markers
- Scissors
- Tape
- Knowledge Factory Images (printed and cut out from Appendix, Section A)

Goals of Exercise

- Identify structural inequities in research that maintain certain power relationships
- Demonstrate how knowledge flows in society and the barriers communities face in giving and acquiring knowledge
- Introduce basic principles of Research Justice
- Understand how we can strategically control knowledge flow in society, and control knowledge production to achieve our goals.

Agenda


1. Who's Got the Power?.....15 minutes
2. Tour of the Knowledge Factory.....25 minutes

Set up

- Put up Goals & Agenda
- Have Knowledge Factory images (Appendix, Section A) printed on single-sided sheets of paper and cut them out. Have tape and markers ready.
- Tear out two pieces of flip chart paper and place them side-by-side on the wall. This will be where you draw/layout the Knowledge Factory.
- Write up the three discussion questions for "Who's got the Power?" (bottom of pg. 19)
- Write up a summary of "Research Oppression" & "Research Justice" on flip chart paper.

Facilitator Instructions

1. Who's got the power? (15 min)

 A family who lives near large agricultural fields suffers from asthma caused by the pesticides and pollution. The mother reports this verbally at the local city council hearing. She says many of her neighbors and coworkers share this experience. She is dismissed by the city officials, saying there is no connection between her family's asthma and the fields. The following month, the Environmental Protection Agency (EPA) sends a report to the City Council saying that asthma in the area is caused by pesticides and other pollutants from nearby farms. The City Council declares immediate action should be taken.

 Reveal the following discussion questions on a flip chart paper:


1. How was the community voice regarded? Why?
2. How was the institutional voice regarded? Why?
3. Who are the people in power most likely to listen to? Why?

Break-out Groups: Take five minutes to discuss in pairs or groups. What role did political legitimacy and types of knowledge play in how the scenario played out?

Draw out participant experiences of when knowing or speaking the truth in itself may not be enough to impact change.

Indicators of Research Oppression in our Communities

- Community voices and experiences are dismissed or ignored.
- Information (governmental, academic, etc.) is inaccessible: too much jargon, costs money, language barriers, etc.
- Dominant narratives exclude or misrepresent community experiences and yet decisions about the community are made based on those narratives.
- Communities don't have control over how data from outside researchers is produced and used.

 Many times, our voices are ignored and people with more power get to tell our stories to advance their own agenda, often at our expense. We don't have control over how knowledge about our communities gets produced and used. We call this research oppression. What are some examples of ways we experience research oppression?



- History books don't tell our stories
- Inaccurate and negative messaging about our communities
- Official reports cost money and are hard to understand
- Decision-makers pass policies based only on mainstream research and don't take our knowledge into account



What are the impacts of research oppression on our community?



- We feel powerless
- We start to believe negative messages
- We get jaded
- We stop recognizing our own wisdom
- We get silenced

Engage participants in a conversation until they get a good understanding of research oppression.



Reveal summary of research oppression on flip chart.



Summary

People often view research by institutions and professionals as valid and authoritative while information from non-institutional sources is considered invalid and less reliable. This often leaves us feeling powerless and undervaluing our own knowledge. In order to make real changes in our institutions we must fight against research oppression by proactively exercising strategic choice to create "validity" behind our voice.



2. Tour of the Knowledge Factory (25 min)

For this exercise, we will work with a visual representation of how information is accessed, produced, and disseminated.

STEP

1

LAY OUT THE KNOWLEDGE GRID

With two pieces of flip chart paper, draw the outline of the Knowledge Factory (see below). Describe the different quadrants and how they each represent different political sectors. Ask participants to brainstorm examples for each quadrant of who falls under that category.



The upper quadrants are where knowledge is originally located. We refer to them as the sources of knowledge.

Upper left corner:

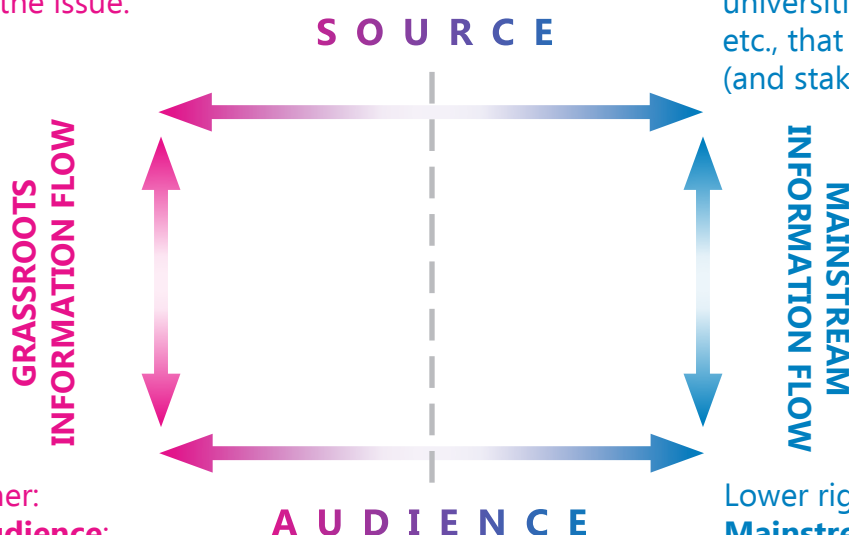
Grassroots Information:

the core group of people driving the campaign and/or affected by the issue.

Upper right corner:

Mainstream or Institutional Information:

government agencies, universities, corporations, etc., that have influence (and stake) in the issue.



Lower left corner:

Grassroots Audience:

the broader community (includes others affected by issue & allies).

Lower right corner:

Mainstream or Institutional Audience:

people/institutions with political power to give us what we want.



The lower quadrants are where knowledge flows. We call them target audience, i.e. the people who are educated, influenced, and empowered by your research.

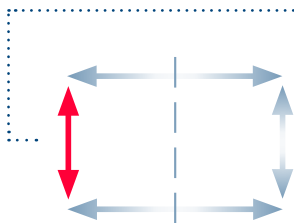
Draw a line down the middle of the diagram.



The corners of the chart represent where knowledge is located. The arrows represent how and where knowledge travels. The line down the middle marks the barrier the left side (community) often faces in receiving and giving knowledge to the right side (mainstream). Any questions?

STEP 2 FILL IN THE GRID

Walk through the following processes to demonstrate how knowledge flows from quadrant to quadrant using images included to create a visual.



The Right to Communicate: Grassroots Information to Grassroots Audience

Our communities create and use new knowledge everyday. It is located in our history and experience and expressed in our cultural traditions, political actions, as well as our day-to-day activities. We share this knowledge seamlessly in order to survive and thrive with our cultures intact. What are the tools we use to transfer this type of knowledge within our community, from one neighbor to another?

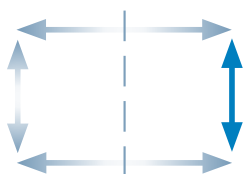


- Cultural events
- Oral traditions
- Theater
- The arts
- Organizing in neighborhoods or workplace
- Ethnic newspapers
- Flyers

As each participant names an example, find an appropriate image and place on the diagram. If there isn't an existing image, draw or write it on the diagram.



We have different ways we share stories and information in our communities. Through stories, music, and other forms of art, we learn from each other about what is happening in our community.



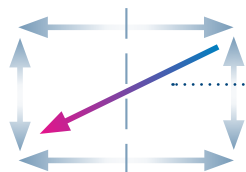
What We're Often Excluded From: Mainstream Information to Mainstream Audience



'Research,' by and large, is seen as an important function of many institutions in society, whether it be government agencies, corporations, churches, schools or hospitals. Often, academic studies, government reports, and other published information products are not intended for grassroots audiences, and even if they are, they can still be inaccessible. What are ways that knowledge is communicated to those institutions from the recognized and "official" experts?



- Government reports
- Academic studies
- Police reports
- News coverage
- Census
- Policy briefings
- Press conferences
- News media
- Consultants



The Right to Know: Mainstream Information to Grassroots Audience

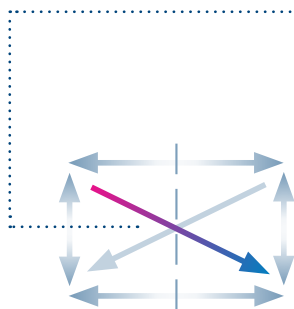
Draw a diagonal arrow from the upper right quadrant to the lower left quadrant to represent the flow of knowledge from mainstream institutions and communities.



The community also needs institutional information. But often it does not have access to this information even when it concerns the community itself. Sometimes information is proprietary and expensive. Other times, it's hard to understand or it's not translated into our native languages. This means our role is to break down and translate the information so that our community has access to it. The diagonal line represents our **'Right to Know.'**



Post OUR RIGHT TO KNOW image.



The Right to be Heard: Grassroots Information to Mainstream Audience

Draw a diagonal arrow from the upper left quadrant to the lower right quadrant.



Even if community voices are not heard, and community stories are often dismissed as anecdotal, we still need to fight at the decision-making table. The second arrow represents our **'Right to be Heard.'** What are ways we have historically reached the policy makers?



- Community surveys
- Town halls
- Reports
- Writing letters
- Media events
- Visiting policy makers



Post OUR RIGHT TO BE HEARD image.



Summary

The Knowledge Factory of our society reveals how information can flow within and across sectors and the political implications associated with it. The good news is, although community knowledge often stands at a disadvantage in terms of moving policy makers, you *can* control the means of your own knowledge production and move the information in the way you see fit along the arrows in the Knowledge Factory. And that's what we call Research Justice!

How would you move information through the knowledge grid to achieve your goal?

Take a few responses.



Reveal DataCenter's Vision for Research Justice:

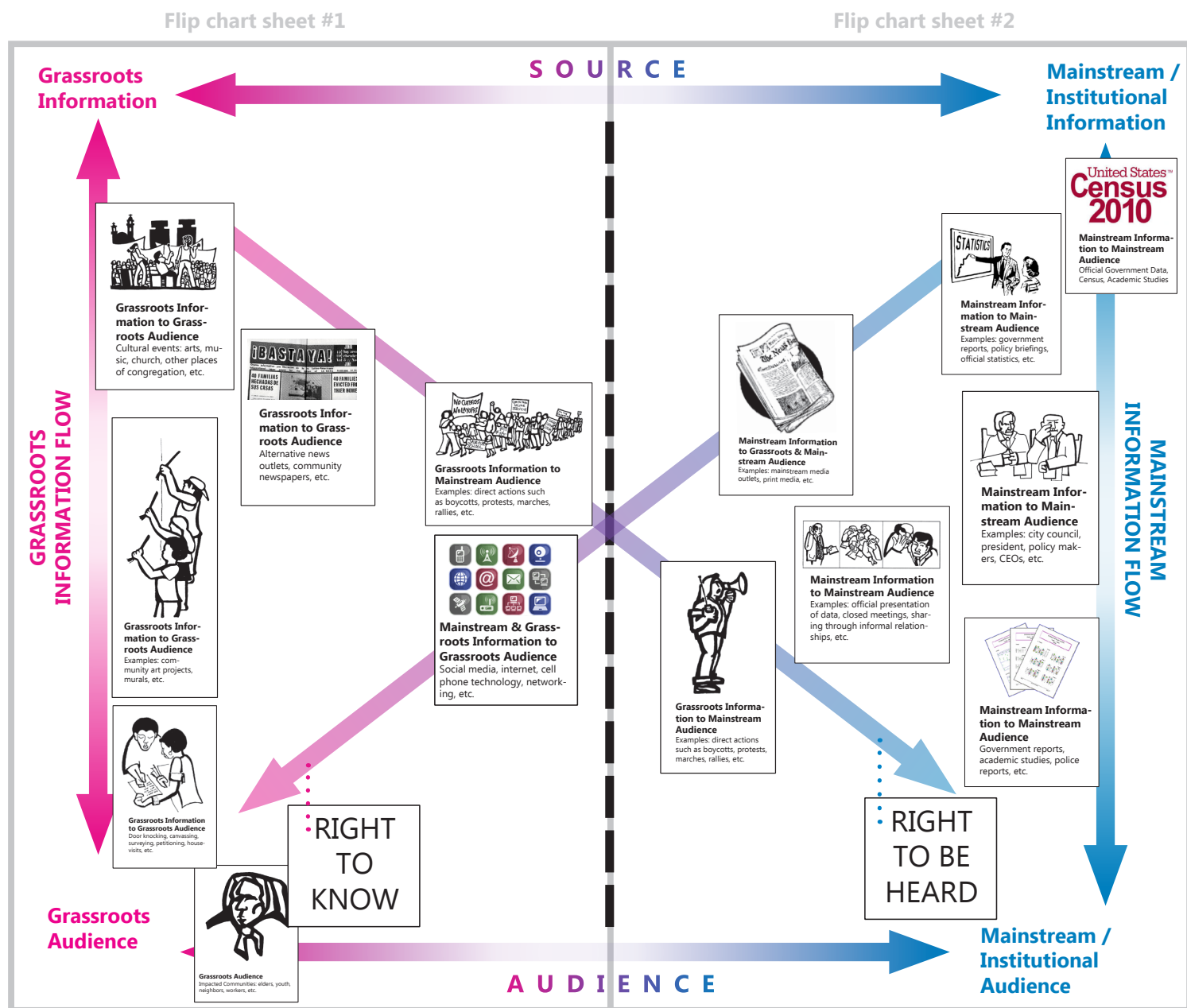


INTRODUCTION TO RESEARCH JUSTICE INSIDE RESEARCH JUSTICE

DataCenter's Vision for Research Justice

- ✓ **The Right to Know:** Communities have unfettered access to production, documentation, possession, and use of their own data.
- 📢 **The Right to Be Heard:** Community knowledge and methods to attain it are recognized as legitimate.
- 👥 **The Right to Self-Determination:** Independent research infrastructure is built to ensure accountability to community needs and demands.

A sample diagram of a completed Knowledge Factory:



For Knowledge Factory images, see Appendix, **Section A**.



Chapter 2

Research and Organizing

How Does Participatory Research Support Organizing?

The participatory research process synthesizes the collection and use of knowledge – research and action. When a community’s lived experience impels it to do research, and when the community designs, implements, assesses and releases its research project, the community engages in actions that will transform its situation. When we gather our stories together, we promote dialogue, encourage action and inform policy. Participatory research speaks to creating a world together, grounded in shared experiences and collective action.

In *Pedagogy of the Oppressed* (1993), Paulo Freire refers to this process as *conscientization*: the cycle of reflection-action-reflection through which both consciousness and personal engagement develop and promote social change. Conscientization is a critical dynamic to a transformative research process. We, as researchers, bring our own world views and perspectives (that are often connected to communities we are working with) and are mutually transformed by the process of engagement with the community and the research.

DataCenter is committed to research that builds community leadership, local capacity for change and self-determination. We seek to develop the skills and experience necessary within groups we collaborate with, so that self-sustaining community-based research is used in future organizing work. We see our role as facilitating – not leading – research projects, to support research and provide tools for groups to use. When we collaborate with community groups in a participatory research process, members are involved in every step of the planning and implementation of the research project.

Participatory research effectively does the following:

- informs the group’s long term strategies
- builds the community’s membership
- informs policy recommendations
- supports the organizing work of the community group



Praxis is the process by which a theory, lesson, or skill is enacted, practiced, embodied, or realized. It refers to the act of engaging, applying, exercising, realizing, or practicing ideas.

“For apart from inquiry, apart from the **praxis**, individuals cannot be truly human. Knowledge emerges only through invention and re-invention, through the restless, impatient, continuing, hopeful inquiry human beings pursue in the world, with the world, and with each other.”

—Paulo Freire

Research for Action

Community-driven research facilitates the strategy to build power from the ground-up by unifying the voices of many into a powerful narrative that can withstand public scrutiny. But this process must be done with the purpose of turning knowledge into action.

Asserting community expertise requires **challenging the power structures** that keep communities from having a say in the decisions that impact their lives. **Organizing** is the process of bringing people together in a coordinated way to improve their lives and fight for their vision of social change.



What is power?

Types of Power:

Institutional Power: The control that institutions have over the way society is constructed and maintained (i.e. churches, schools, government, etc.).

People Power: The power we have to collectively make change in the world.

How do we build people power?

- ☒ Recognize our own expertise
- ☒ Build our power in numbers
- ☒ Engage in coordinated action
- ☒ Make informed decisions!

Research for Action helps us:

- ☒ Recognize the kinds of power we hold
- ☒ Articulate our vision for a just society
- ☒ Create solutions for the problems we face
- ☒ Act together to fight for lasting change



All components of organizing involve research, whether it is recruiting members through community surveys or engaging members in deeper campaign strategy. Each component of organizing involves a method for engagement in both theory and practice. Each opportunity to learn from the experience of action helps us become more effective change-makers.

Organizing is about keeping impacted community members engaged through a series of activities, building their power in numbers, and facilitating their personal transformation through knowledge and action. In order to be effective in this process, we must have a deeper analysis of what we're trying to change and how we want to change it, which cannot be achieved without research.

Using Research to Support Organizing

Here are some ways research can be a significant part of what you do as an organizer. Can you think of others?

Main Aspects of Organizing	Examples of Research
Base-Building Recruiting and retaining a large group of community members to participate in, help implement and direct the work of your organization.	<ul style="list-style-type: none">✓ Assessing needs in the community through door-to-door surveys and other participatory methods✓ Holding community events to present original research on the community, help folks see they're not alone, and encourage them to come together✓ Using powerful data to amplify community voices
Campaign Development Building sustained fights to win concrete policies and institutional changes on issues that impact your community.	<ul style="list-style-type: none">✓ Finding information to inform campaign strategy and develop analysis of what it will take to win✓ Researching the feasibility of possible demands to build a campaign around
Leadership Development Developing the political analysis and practical skills of members of your organization.	<ul style="list-style-type: none">✓ Training community members to carry out participatory research (designing, implementing, and analyzing findings)✓ Developing leaders' skills to share powerful narratives for various audiences✓ Engaging leaders in power mapping and developing campaign strategy
Organizational Development Building capacity and infrastructure to sustain effective campaigns and leadership development, and institutionalize those functions.	<ul style="list-style-type: none">✓ Evaluations to make assessments of the health of the organization✓ Database management✓ Research to inform fundraising strategy, such as donor prospecting

Indeed, the connections between research and organizing are truly diverse. And yet, it is “taught” to our people as a technical exercise that is not a collective process of strengthening the community in so many empowering ways.

Involving community members in initial campaign strategy is a useful tool for democratizing information. Often times, combining community and mainstream knowledge will get you a lot of useful preliminary information to inform your strategy. The following are some examples of initial questions for exploring a potential campaign.

Issue/Problem

- ✓ What is the problem we are facing?
- ✓ What is the long-term solution? What are potential short-term solutions?
- ✓ Who has worked on this issue before? What research has been done on the issue?
- ✓ Who is impacted by the issue (i.e. constituency)?

Political Landscape

- ✓ Who has the power to give us what we want (i.e. target[s])?
- ✓ Who are our potential allies? What is their interest in the issue?
- ✓ Who are our potential opponents? What is their agenda? How can we neutralize them?
- ✓ What leverage do we currently have? What leverage do we need?
- ✓ What does our target care about? Who do they listen/respond to?

Strategy

- ✓ What would put pressure on our target(s) to get them to pay attention?
- ✓ What information do we need to gather to get leverage and how?
- ✓ How can we combine information gathering with organizing?
- ✓ What tactics would engage our members most effectively and build our power?

Research and Organizing Workshop

The following workshop is a basic introduction to organizing strategy and campaign development. The workshop includes exercises and discussions to help participants understand the importance of research in developing organizing strategy.

• Research for Organizing (pg. 30-31)

A guide for discussing the linkages of research and organizing.

This workshop, as with all workshops in this toolkit, makes use of the following Icon Key. For a larger version, see Section C of the Appendix.

Icon Key

This toolkit uses icons to help signify different types of information.



The Script: content that should be read aloud by the facilitator to the participants



Example Responses: typical participant responses to questions asked by the facilitator



Materials Needed: a list of all the materials that are required for an activity



Facilitator's Note: tips provided for the facilitator. They make the toolkit easier to navigate



FYI Lightbulb: a little extra information



Quotes: a quote from a key figure in Research Justice



Handouts: a section in the toolkit that is meant to be handed out to participants

Research for Organizing

15 minutes

 **ACTIVITY**

Materials

- Flip Chart Paper & Markers
- Handout: How is Research Used in Organizing



Goals of Exercise

- Shine light on the use of research as a political tool
- Understand intersections between research and organizing



Agenda

1. How Research is Used in Organizing.....15 minutes



Set up

- Put up Goals & Agenda
- Make copies of *How is Research Used in Organizing?* (pg. 31)

Facilitator Instructions

How Research is Used in Organizing (15 mins)



As communities fighting for social justice, research helps inform our agenda, but, more importantly, it provides an opportunity for bringing people together in a coordinated way towards our goals.

Pass out *How is Research Used in Organizing?* handout. Introduce the concept of organizing and its components.

For each component, ask participants to brainstorm a few examples of how research can be used to strengthen it. For a list of examples, refer to page 27.

How is Research Used in Organizing?

HANDOUT

Organizing: bringing people together in a coordinated way to build their collective power to win improvements in their lives and work towards long-term institutional change.

Instructions: Fill in the blank check-marks with examples of research. Sample responses are shown in italics.

Organizing	Examples of Research
Base-Building Recruiting and retaining a large group of members of your impacted community to participate in and help implement and direct the work of your organization.	✓ <i>Documenting shared (and hidden) experiences of a community.</i> ✓ ✓
Campaign Development Building sustained fights to win concrete policies and institutional changes on issues that impact your community.	✓ <i>Target Research: Finding information about a polluter and developing analysis of what it will take to make them stop.</i> ✓ ✓
Leadership Development Developing the political analysis and practical skills of members of your organization.	✓ <i>Training community members to document and speak up about their lived realities.</i> ✓ ✓
Organizational Development Building capacity and infrastructure to sustain effective campaigns and leadership development.	✓ <i>Evaluations of programs of the organization.</i> ✓ ✓



Chapter 3

Research Methodology Basics

Research Methodology: The Crock Pot Analogy

DataCenter relates the process of extracting and delivering knowledge to the process of serving soup from a crock pot. What we serve and how we serve it will largely depend on whom we're serving and under what conditions we're serving our soup.

Research is made up of three elements: **sources, tools, and methods**. We call this "methodology."

The Three Elements of Research Methodology: Sources, Tools, and Methods

Research Element:	Examples of Sources in Research	Examples of Sources in the Crock Pot Analogy
Sources The sources are the places where your information lives.	<ul style="list-style-type: none"> ✓ Census Data ✓ Article or book about your issue ✓ People in your neighborhood ✓ Public documents 	<ul style="list-style-type: none"> ✓ Soup ✓ Stew ✓ Porridge
Tools The tools are what you use to extract the information you need.	<ul style="list-style-type: none"> ✓ Intake form ✓ Interview script ✓ Tape or video recorder ✓ Online or written survey 	<ul style="list-style-type: none"> ✓ Ladle ✓ Chopsticks ✓ Shallow spoon ✓ Deep spoon ✓ Tongs
Methods The methods are the procedures you use to extract and disseminate your information.	<ul style="list-style-type: none"> ✓ Extract the information: <ul style="list-style-type: none"> • documenting shared (and hidden) experiences of a community • organizing focus groups • submitting a Freedom of Information Act request • community mapping (Geographical Information Systems) ✓ Present the information for different audiences: <ul style="list-style-type: none"> • formal report complete with recommendations for policy makers • a community-focused teach-in 	<ul style="list-style-type: none"> ✓ Extract the soup: <ul style="list-style-type: none"> • scoop deep into the soup • skim the top • cool it down • pick out specific ingredients ✓ Present the soup for different audiences: <ul style="list-style-type: none"> • fancy bowls in a display • casual bowls for friends and family



Choosing the right research tools is similar to choosing the right kitchen utensil — you need the tool(s) that will maximize your effectiveness.*

The soup in the pot represents your source, the place where your information lives. The source you choose will depend on what information you are looking for. Choosing whether to find information from a publication, online resource, mainstream institution, or directly from the community will depend on your organizing goals. The analogy goes like this:

- The soup inside the crockpot is what you want (the **source**).
- The ladle is the instrument you use, uniquely designed specifically for extracting soup (the **tool**).
- How you use the ladle — perhaps stirring gently, or simply skimming off the top, will get you exactly what you want from the soup (the **method**).

Every soup has different ingredients and textures. To serve a thicker soup, you may want a bigger ladle to capture the ingredients. If you have noodles in your soup, you may use chopsticks or tongs. The instruments you use to get your soup out of the pot represent your tools, what you will use to extract the information you need. Research tools are often tangible instruments we use in research such as written surveys, tape recorders, or online search engines.

How you choose to extract and present your soup represents your methods and will depend on a number of conditions. For example, if you want to eat the soup quick, you might have to skim the soup from the top where it's cooler. Likewise, in a research project, if you want your information quicker, you might use online resources instead of a custom survey tool.



How you choose to package and serve your soup relates to the series of procedures you use to disseminate your information to your target audience. Whether you are serving a fancy or family meal will dictate your presentation (i.e. type of bowls, place settings, accompaniments, etc.).

Any research, if intentional, will consist of these three elements according to how you identify them. Thinking about your community's goals will give you insight into choosing the most effective elements for your research project.

Within a research project, you may choose multiple sources, tools, and methods to achieve the various goals of your campaign, which will inevitably involve considering diverse audiences such as your community, decision-makers, and everybody in between. Choosing the methods and tools that will give you a variety of data to cater to a variety of audiences will result in a stronger campaign.

*Photo credit: <http://flickr.com/photos/lafattina/>

Research Planning 101

Understanding research in the context of an organizing agenda can seem like an overwhelming task. There is no shortage of available information in our modern society, especially with the prevalence of technology.

As we approach research, we must be strategic in order to avoid going down rabbit holes of information or getting side-tracked with information systems that often confuse and derail us.

DataCenter breaks down research into four stages:

1. Goal Setting
2. Planning
3. Execution
4. Outcomes

Within each stage, there are multiple steps to approach your research project. Though each step is taken in different stages of a campaign, having a well thought out project that identifies outcomes on the front end will ensure a streamlined process.



Note the cyclical nature of the steps. Starting with **Goal Setting** will help to ensure you develop intended outcomes on the front end. Once you've finished **Planning** and **Execution**, evaluate your **Outcomes** and repeat the steps.



GOAL SETTING

1. Identify Organizing Goals

Before you approach your research project, you must solidify your **organizing goals**. Your research project will be one of the ways in which you bring people together, build collective power, and demonstrate it. These goals should be concrete (i.e. build a base, develop leaders, etc.).

2. Identify Research Goals and Outcomes

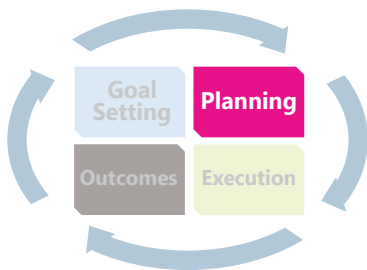
Your **research goals** should be articulated in one or two sentences to outline your long-term organizing goals, the information you need, and how you plan to use that information. What visible and measurable impact do you wish to achieve by executing your research?

3. Identify Audience and Data

Based on your goals and outcomes, who is the intended **audience**? Your audience should be the people you want to directly or indirectly move on an issue. Oftentimes, it will be a decision-maker, those who move your decision-maker, and your support base. You will want to target different audiences to achieve the various goals of your campaign.

For instance, you may want to use certain research methods as a way to engage the community about the issue and move them into action. You could then use the results of your research to sway public opinion and put pressure on decision-makers. To prioritize what information you need, you should *always be as specific as you can be about your audience*.

For multiple audiences, different **data** will be beneficial for different purposes. You must identify what information will most effectively advance the goals of your campaign and what research questions will lead you to that information.



PLANNING

4. Assess Capacity and Timeline

Often in community organizations, **capacity** is limited. We must understand how to integrate research and organizing to use our resources most effectively. Capacity issues include:

- ✓ **Labor.** How many staff members do we have available to carry out the work? How many members and volunteers can we get involved? Are there potential partnerships and allies available to support our work? What skills do we have available? What level of training do we need to provide to carry out the work? Is there outside technical or policy expertise that should inform our research design?
- ✓ **Funding.** How much money can we allocate to our research project? Will it be a large-scale or small-scale project? Do we have resources to print out a report, or will we forego a deliverable production?
- ✓ **Data Control.** How vulnerable is the population we are working with? What are the limitations of our data? Under what circumstances can we share the data? Are there specific agreements or measures to put in place to ensure data security?

Your campaign **timeline** will often determine the scope of your project. Since your campaign is a series of tactics that build off of one another, research should always strategically coincide with your tactics. For instance, if you want to have a town hall to hold public officials accountable on a certain issue, presenting your research on the issue at that time will not only legitimize your position but also put public pressure on your target.

If there is an important decision coming up on an issue at City Hall, your research project should prepare you to impact that decision. You may also want to look for calendar hooks — certain events, holidays, or occasions that are relevant to the issue you are working on. Your timeline will dictate the duration of your project and your methodology.

5. Identify Sources, Tools, and Methods

Your research is never singular. Your **sources**, **tools**, and **methods** constitute the elements of your research. In many cases, this will depend on the previous considerations, such as capacity, resources, and timeline.

With your organizer hat on, you want to balance your research goals with your organizing goals. For instance, you may not have the time to do an in-depth survey, but you want to engage your members so you decide to survey a smaller sample of your neighborhood to inform an appropriate outreach strategy. Alternatively, you decide to run a training for your leaders on how to do online



research in order to ensure that they are finding answers to their own questions.

With your research hat on, you understand the limitations of the research given your capacity, and decide to couple your participatory research methods (surveys, interviews, focus groups, etc.) with secondary research (literature reviews, online corporate profiling, researching public documents, etc.) that is carried out by an experienced investigator.

In any case, you should ensure that your methodology reflects both your organizing and research interests and that your constituents participate in the political leadership in shaping their research strategy.

6. Design Your Research Tool

This step of the planning stage should involve your membership in a meaningful way. For instance, if you decide the tool is a survey, community members should go through the process of determining the questions, design, and plan for execution in the context of their own political education and leadership development.

The process of tool design is an opportunity for members to have ownership over the research project and understand its role in the overall organizing strategy, which keeps them invested in the process and outcomes.

Create a plan for how to test and execute your tool including a timeline and roles. It is also important to make an intentional decision about the level of rigor with which you plan to design your tool and how much social science criteria you wish to apply.

Examples of factors to consider:

- What sample size will we need to be seen as ‘representative’ by our target audience?
- How should we design the questions to get the information we want, in a way that can easily be consolidated and analyzed later?
- How much social science criteria is needed to establish ‘mainstream credibility’ to our research?



💡 It's very important to pilot your research tool. To 'pilot a tool' is to take the tool(s) you develop and test them with a select group of people that belong to the community you hope to target. This testing phase usually reveals unforeseen issues with the tool you created, and allows you to create a more robust and effective tool.

EXECUTION

7. Collect and Analyze Data

Execute your plan so that it articulates your methodology, timeline, and roles. Devote a period of time to pilot your tool and improve what you can. Devote a period of time to **collecting the data**. Your membership should be engaged in this process. Develop an internal system or process for collecting your data in a centralized way. In many cases, this will be an electronic database, spreadsheet or file folders.

There are two types of data:

- ✓ **Quantitative:** Data that is generally in numerical form. Quantitative data often involves ranking, measuring, and categorizing.
- ✓ **Qualitative:** Data that is generally descriptive and non-numerical. Qualitative data often involves description of observations, events, anecdotes, and personal stories.

The type of data will be different depending on your method. For example, a survey can result in a series of statistics while interviews can result in a series of tabulated notes and transcripts. Many methods can generate both quantitative and qualitative data.

Data analysis is a process of inspecting and cleaning data with the goal of highlighting useful information that will serve your campaign. Many advanced software tools will do this for you, but it would be important to have basic statistical analysis capacity on your team to generate findings by way of numbers. You also need a thoughtful, facilitative process for interpreting and exploring what the numbers are telling us, what their significance might be, and what meanings we can draw from them.

8. Synthesize Data into "New Knowledge"

A guiding assumption of community-driven research is that the community already inherently has expertise on the issue. In many cases, our research tools make the obvious evident. We want to be able to prove what we already know to be true.

The process of synthesizing data is to take the generated information and synthesize it into powerful messages that reflect our experiences and shine light on both the problems we are trying to address and the solutions for which we are advocating.

Often, this "new knowledge" will challenge our own previous assumptions and require us to reflect critically on the issues. Engaging the community in this process is challenging, since it involves the process of bringing community members together and agreeing on the *unique* knowledge of strategic value, but

it is essential. Organizing is about building collective consciousness through thoughtful engagement about the findings of our data. This process will help community members understand the collective issues rather than focusing on their own individual realities.



OUTCOMES

9. Package and Disseminate Knowledge

By this stage of the research, you should have built considerable capacity through base-building, leadership development, and tactical alliances with outside partners. You should also have a better understanding of what it will take to achieve your research goals.

Referring back to your intended outcomes, how will you deliver your information to your intended audience?

If you have built up membership support, perhaps you can mobilize enough people to stage a high-visibility public action to deliver your newfound knowledge in order to put your community voice front and center of the decision making table. Or, if you lack membership support, perhaps you will disseminate your knowledge via social media or some other online tools.

For many, the research deliverable is deployed in a stage of escalation focused on the decision maker or target. For others, it will be a fact sheet distributed at a community event to engage a broad base of your constituency about the issue. In many campaigns, the research deliverables have been created specifically to use in a tactic of escalation (i.e. members lobbying officials, etc.).

10. Reflect and Evaluate Outcomes

Your research will inform your knowledge, messages, and action. With your new information reflect on the impact of your action and generate more questions. This is the transformative nature of our work. We must thoughtfully evaluate the outcomes of our research and its impact.

For instance, we may not have succeeded in getting a policy change, but we shifted public opinion about an issue and built fertile ground for more organizing. Or, we ended up learning something new about what the community needs which has helped shift our organizing goals to better reflect what our membership wants to fight for.

Intentional reflection leads to improvements in the way we approach the work. If our research is truly community-driven, it will achieve many, if not all, of the outcomes we have intended and shine light on what we need to improve in the next cycle of our campaign.

Why Methodology Matters for Organizing

Communities have traditionally engaged with various community-driven research methods. In evaluating these methods, the relationship between research and organizing is critical.

Community-driven research has a social change agenda and is embedded within a larger organizing strategy. For those of us with a core commitment to grassroots leadership development, it is a means by which community members gain powerful knowledge to build their political ‘legitimacy.’

All participatory methods should create opportunities to engage and organize impacted communities. Research methods should extract valuable knowledge to inform social change strategy. Each method has its advantages and limitations in the following areas:

- ✓ Organizing strategy
- ✓ Resources and timeline
- ✓ Data
- ✓ Messaging

Organizing Strategy

If you want to get to scale and build a broader base, methods such as surveys and community mapping will connect you to a larger number of people. They function as great recruitment tools and provide an opportunity to understand your constituency more deeply. The data often reaffirms that members' experiences are not isolated, and deepens rapport.

On the other hand, methods such as interviews and focus groups allow you to go deeper with community members, establish trust, and build relationships. Focus groups allow you to connect community members with one another to see the commonalities of their experiences. All participatory methods will allow you to engage members in their implementation and provide opportunities to develop their leadership through skill-building and collective learning.

Resources & Timeline

Your methods are informed directly by your intended outcomes, and who you are targeting to achieve them. But to be achievable, you must shape them within the scope of the resources and capacity available to you. For instance, with enough trained surveyors and good planning, surveys can be a great way to saturate a neighborhood and get a lot of information quickly.

On the other hand, interviews and focus groups may take more time because they require facilitation and coordination of schedules.

Each of these methods require some level of investment in skill-building and piloting.

Data

Certain methods such as interviews and community mapping are exploratory and can get you both expected and unexpected data. This often helps deepen your analysis about the problem and find solutions on a particular issue, but they are often nuanced and hard to navigate.

Other methods, such as surveys and focus groups, are more focused and serve a particular purpose. They ask specific questions and capture particular data that will help you to support your claim on an issue.

Messaging

Depending on how you want to convey your message, each method can result in a number of outcomes. Some methods, such as surveys and focus groups, can produce multiple statistics that can be conveyed visually or translated into powerful statements.

Other methods, such as community mapping, can translate into powerful non-verbal statements in the form of visuals. All methods will help you craft a message that speaks to various audiences but some methods have limitations as to how specific or broad your message will be.

The stories and anecdotes of community experiences may pull some heart strings of some decision makers but it is the hard data that will show the breadth of the issue with irrefutable precision to compel them.

Research Methods Workshops

The following are two of the workshops DataCenter uses to introduce research methods and planning .

• **Understanding Participatory Research Methods (pg. 44-46)**

This interactive workshop gives a good frame for the mechanics of research methodology, which entails walking participants through the process of making soup. The analogy helps participants visualize a process of extracting and disseminating knowledge. The facilitator should tailor the analogy to the experiences of participants.

• **Creating Your Research Plan (pg. 47-50)**

This workshop is an introduction to research planning to help participants understand all the elements of a research plan. The facilitator should emphasize that there are multiple ways to order the stages of a research plan. Effective researchers are ones who can map out a plan that includes bigger picture goals and lower-level details that take into account elements like timeline and capacity.

This section of workshops, as with all workshops in this toolkit, makes use of the following Icon Key. For a larger version, see Section C of the Appendix.

Icon Key

This toolkit uses icons to help signify different types of information.



The Script: content that should be read aloud by the facilitator to the participants



Example Responses: typical participant responses to questions asked by the facilitator



Materials Needed: a list of all the materials that are required for an activity



Facilitator's Note: tips provided for the facilitator. They make the toolkit easier to navigate



FYI Lightbulb: a little extra information



Quotes: a quote from a key figure in Research Justice



Handouts: a section in the toolkit that is meant to be handed out to participants

Understanding Research Methods

25 minutes

 **ACTIVITY**

Materials

- Flip Chart Paper & Markers

⚠ Note: This exercise can be done as a group discussion or a small group exercise. You can break the group up and have each group plan their soup using the discussion questions and have participants report back their soups.

Goals of Exercise

- Get a core understanding of research methodologies and the concepts of sources, methods, and tools
- Grasp the concept of “strategic” research and picking sources, methods, and tools based on intended goals and what is available / feasible.

Agenda

1. Crock Pot Analogy.....15 min
2. Introduction to Sources, Tools, and Methods.....10 min


Set up

- Put up Goals & Agenda


Facilitator Instructions

1. Crock Pot Analogy (15 min)

Draw a picture of a crock pot. Have participants come up and draw different types of ingredients in the crock pot. Ensure that they include ingredients of different sizes.

 We’re going to cook some soup together. What ingredients do you put in your soup?

- | | | |
|---|--|--|
|  | <ul style="list-style-type: none"> • veggies • large noodles | <ul style="list-style-type: none"> • diced onions • meat, etc. |
|---|--|--|

 What are the different textures of soup?

- | | | |
|---|---|--|
|  | <ul style="list-style-type: none"> • thick • watery | <ul style="list-style-type: none"> • a lot of ingredients, etc. |
|---|---|--|



What utensils would work well to get this soup out of the crock pot?



- Ladle
- Spoon
- Fork
- Chopsticks

Show how there is a choice of tools depending on the type of soup. For example, if they say ladle, find something in the soup that the ladle can't get, so that they have to name other tools, like chopsticks, fork, spoon, etc. Guide participants to understand consequences unique to each choice and which ones may be more desirable than others.

2. Introduction to Sources, Tools, Methods (10 mins)



The soup in the pot represents the **source**, i.e. where you go to get your information. The utensils you described represent the **tools**, i.e., the instruments you use to extract the information you need from the source.

Research tools can be tangible things, like the 'tools' we often think of, such as a shovel for gardening. What are the different ways to extract, and then serve your soup?



- Shallow vs deeper bowls
- Pour slowly so you don't spill
- Stir so you get the heavy beef chunks
- Take off burner so you don't get burnt



The way you get the soup out and serve it represents the **method**, i.e. the way you carry out your research. What may affect your decision on how to serve your soup? Would you serve it the same way to a family member at home as you would to a group of guests at a cocktail party?

Ask participants to give some examples of sources, tools, and methods.



SOURCES

- Community (stories, experiences, etc.)
- Newspapers
- Public documents, etc.

TOOLS

- Surveys
- Internet
- Interviews
- Video recorder
- Interview guide for facilitators

METHODS

- Survey vs. interviews or both?
- How many people will you interview?
- How will you do it most efficiently?



Finally, explain your choices. Did you choose each selection strategically, with an intended outcome in mind?



Summary

The crock pot analogy illustrates the overall methodology of your research. Research is not singular. There are multiple places to get your answer and extract information. For example, to find wages of workers, you can go to government data, check online resources, or ask the workers themselves.

In order to do *strategic* research, you need to understand what your sources, methods, and tools are. Your research will be dictated by what types of knowledge you want and knowing where that knowledge ‘lives,’ what types of sources and tools you have available to you, and how you want to get the information across to your audience.

Creating Your Research Plan

35 minutes

 **ACTIVITY**

Materials

- Flip Chart Paper, Markers, & Tape
- Stepping Stone cards
- Handout: FREE Campaign Scenario

Goals of Exercise

- Understand the core steps of research and practice designing them strategically
- Explore more deeply how to approach research project planning
- Practice creating a mock survey project plan

Agenda

1. Stepping Stones Exercise.....35 mins

Set up

- Print out 2-3 sets of stepping stones cards (see Appendix, Section B)
- Prepare tape for each group to put up stepping stone cards
- Print out (double-sided) a set of the *FREE Campaign Scenario* (pg. 50)

Facilitator Instructions

A research project can feel like a daunting task but with proper planning, it can be done well by even the smallest community group. In this session, our goal is to tackle the research planning process in more depth.

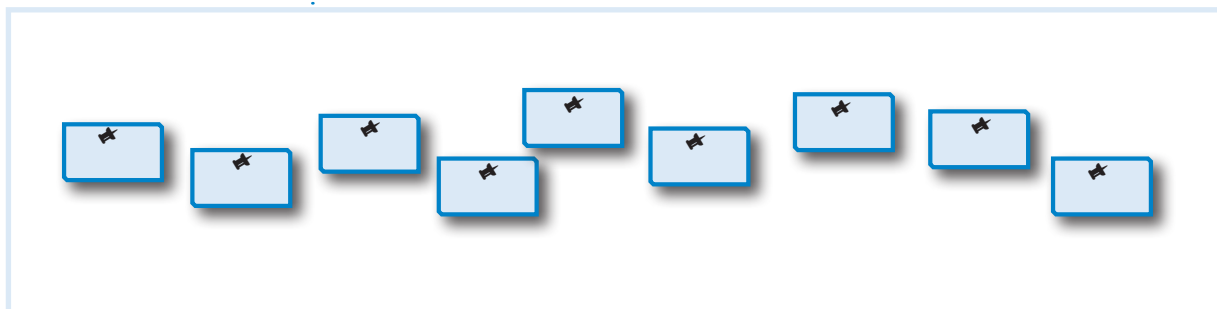
1. Stepping Stones Exercise (20 min)

Divide participants into groups of three. Distribute a set of Stepping Stone cards to each group. Instruct them to post the cards in the correct planning sequence. Encourage participants to work together to determine their answers.

The flip chart should look like the example below:

 = 'Stepping Stone' task card

A wall in the room



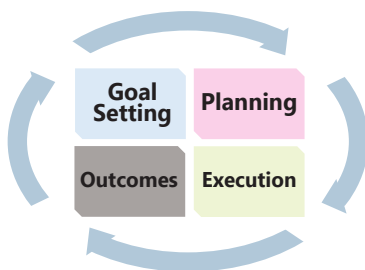
Bring the group back together and compare the different plans as a group. Engage the group in the following discussion.



- Why did you order the cards in the way you did? (Particularly compare the responses of groups.)
- How does that choice impact the rest of the process, or outcomes?
- What was difficult about this process? What made the process work smoothly?
- What steps need further explanation?
- Which steps might need to be reordered? Which might need to be removed?
- Did your group achieve consensus easily or not?

Summarize the discussion. Ensure that participants understand that there isn't necessarily one way to carry out research, but that it is important to think about why they order things in the way they did.

Summarize **Research Planning Exercise (pg. 34)** with the group.



Small Breakout Group (15 min)

Pass out the **FREE Campaign Scenario (pg. 50)**. Have participants break into small groups, read the scenario, and answer the Report Back Questions on the bottom of the handout.

Bring them back to larger group discussion. Ask people to summarize their discussion based on report back questions, specifically why they chose certain people to take on the various roles. Some other guiding questions include:



- Did the plans look different? Why or why not?
- Is the plan realistic?
- What research goal would make sense given the circumstances?



Summary

Having a bird's eye view of all the steps is really important for being able to tackle your research. Doing a survey project is particularly challenging if you are not realistic about your timeline, capacity, and ability to integrate your members in order to achieve your organizing goals. By breaking down the steps, we can have a detailed plan that is easier to tackle in an in-depth research process. This exercise gives everyone a more practical sense of what they might actually do in a research project, greatly demystifying “research.”

FREE Campaign Scenario

You are working for **Families fighting for Racial and Economic Equality (FREE)**, a multi-issue organization in a community comprised of mostly African Americans and Latinos. The city is largely industrial with refineries making up a bulk of the local economy and livelihood of your members. Through your organizing, many accounts have surfaced about people becoming ill with asthma and other respiratory illnesses among those working at or living near the refineries.

Meanwhile, Chev-wrong commissioned a study with top-notch scientists that declared no connection between local asthma and pollution from their facility and blamed eating habits of residents for prevalent health conditions. Through your first-hand accounts with residents and workers, you know that the correlation between the pollution and the public health conditions is a clear example of structural racism.

You wish to engage your community in a survey project that would show the adverse effects of Chev-wrong's refinery on public health conditions in order to push elected officials to take a stand on the issue. The vote for the expansion project is planned for this summer, in approximately three months. Your goal is to go public with findings of your survey with a larger visible membership at that time to influence elected officials' decision on the matter.

The following is a list of factors that will help you in your research project planning:

- ✓ Your base is multi-lingual and multi-ethnic; though your membership is not currently large, you have solid leaders with access to this base
- ✓ FREE has a long-standing relationship with the Public Health Department
- ✓ The Mayor is running on a re-election campaign in three months and has been working to improve his public relations

Report Back Questions:

- What is your intended research project outcome?
- Who will be involved and what will their key role be in each phase of the process?
- How will you collect the data given your timeline?
- What resources (internal & external) will you use to analyze your data?
- What will your final product look like? How will you present it?

Research Capacity-Building Resources for Organizers and Community

DataCenter partners with a number of groups who provide hands-on capacity building in organizing needed to strengthen campaigns for change. The following is a select list of resources for research training, and consultation or technical assistance. Please inquire with organizations directly to receive information of what they provide. This is just a resource list for your reference.

Advancement Project

Advancement Project is a multi-racial civil rights organization. Founded by a team of veteran civil rights lawyers in 1999, Advancement Project was created to develop and inspire community-based solutions based on high quality legal analysis and public education. Advancement project provides direct, hands-on support for organized communities in their struggles for racial and social justice, providing legal and communications resources for on-the-ground efforts, while assisting in building their own capacity and power in their communities. Additionally, the organization actively broadens and extends the practice of community-centered racial justice lawyering through training, networking, creation of tools and resources, media outreach and public education.

✓ advancementproject.org

Healthy City

Healthy City provides data and mapping tools to help you build a better community. The Healthy City team also partners directly with organizations to develop research strategies and web tools that fuel social change.

✓ healthycity.org

Instituto de Educacion Popular del Sur de California (IDEPSCA)

IDEPSCA works to create a more humane and democratic society by responding to the needs and problems of disenfranchised people through leadership development and educational programs based on popular education methodology. Specifically, the organizational goal is to organize and educate immigrants concerned with solving problems in their own communities.

✓ idepsca.org



1904 Franklin Street,
Ste. 900
Oakland, CA 94612
Tel: +1 (510) 835-4692
datacenter.org

For the latest in Research
Justice, subscribe to
DataCenter's monthly
e-newsletter at DataCenter.org.

Public Science Project

The Public Science Project has grown out of more than a decade's worth of participatory action research (PAR) at The Graduate Center of the City University of New York (CUNY). First organized The PAR Collective, we began our work as a coalition of activists, researchers, youth, elders, lawyers, prisoners, and educators, launching projects on educational injustice, lives under surveillance, and the collateral damage of mass incarceration. Most of our projects have been situated in schools and/or community-based organizations struggling for quality education, economic opportunities, and human rights. Knowledge-sharing research camps set the stage for most of our research, designed to bring together differently positioned people around a common table to design and implement the research: youth and educators; young people who have been pushed out of schools and mothers organizing for quality education in communities under siege; prisoners, organizers, and academics. Most projects have vibrant advisory boards of youth, community elders, educators and/or activists to shape the work and hold us accountable to the needs and desires of local communities.

✓ publicscienceproject.org

Strategic Concepts in Organizing and Policy Education (SCOPE)

SCOPE builds grassroots power to eliminate the structural barriers to social and economic opportunities for poor and disenfranchised communities. Economic justice and civic participation campaigns and organizing *Research workshops and publications. Training workshops and materials on: Power Analysis, Basic and Advanced Community Organizing, Civic Participation Strategies and Programs, Coalition and Alliance-Building, Public Policy Advocacy Campaigns, GIS Mapping and Strategic Planning.

✓ scopela.org

Urban Justice Center

For 29 years, the Urban Justice Center has served New York City's most vulnerable residents through a combination of direct legal service, systemic advocacy, community education and political organizing. We assist our clients on numerous levels, from one-on-one legal advice in soup kitchens, to helping individuals access housing and government assistance, to filing class action lawsuits to bring about systemic change.

✓ urbanjustice.org



Appendix

Section A:

Knowledge Factory Images (16 images)

Section B:

Stepping Stone Cards (11 cards)

Section C:

Icon Key



Grassroots Audience

Impacted Communities: elders, youth, neighbors, workers, etc.

— — — — —
Cut here



Grassroots Information to Grassroots Audience

Door knocking, canvassing, surveying, petitioning, house-visits, etc.



Grassroots Information to Grassroots Audience

Alternative news outlets, community newspapers, etc.

Cut here



Grassroots Information to Mainstream Audience

Examples: direct actions such as boycotts, protests, marches, rallies, etc.



Grassroots Information to Mainstream Audience

Examples: direct actions such as boycotts, protests, marches, rallies, etc.

— — — — —
Cut here



Grassroots Information to Grassroots Audience

Examples: community art projects, murals, etc.



Grassroots Information to Grassroots Audience

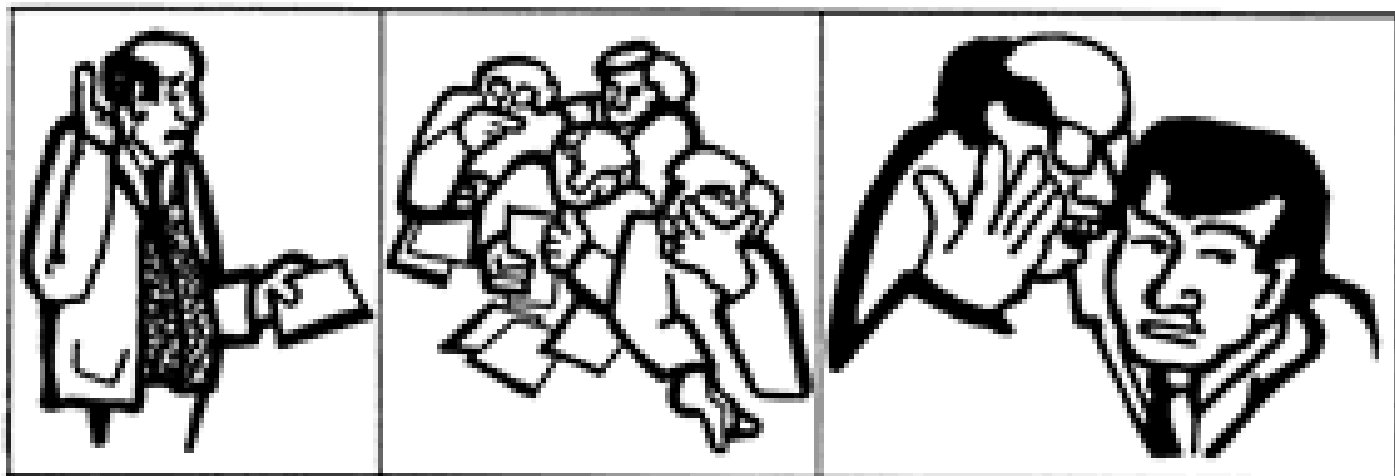
Cultural events: arts, music, church, other places of congregation, etc.

Cut here



Mainstream Information to Mainstream Audience

Examples: government reports, policy briefings, official statistics, etc.



Mainstream Information to Mainstream Audience

Examples: official presentation of data, closed meetings, sharing through informal relationships, etc.

Cut here



Mainstream Information to Grassroots & Mainstream Audience

Examples: mainstream media outlets, print media, etc.



Mainstream Information to Mainstream Audience

Examples: city council, president, policy makers, CEOs, etc.

Cut here



Mainstream Information to Mainstream Audience

Government reports, academic studies, police reports, etc.



Mainstream & Grassroots Information to Grassroots Audience

Social media, internet, cell phone technology, networking, etc.

Cut here

United States™
Census
2010

Mainstream Information to Mainstream Audience

Official Government Data, Census, Academic Studies



RIGHT
TO
KNOW

Cut here

RIGHT
TO BE
HEARD

Identify
organizing
& research
goals

Cut here

Determine
Audience

This page is intentionally left blank

Do background
and supplemental
research
(Literature review, etc)

Cut here

Decide
on key
research
questions

This page is intentionally left blank

Assess
capacity/
timeline/
resources

Cut here

Design
the
tool

This page is intentionally left blank



Create database

Cut here

Analyze data

This page is intentionally left blank

Package
data into
report and
disseminate

Cut here

Train
people to
use tool

This page is intentionally left blank

Collect data

This page is intentionally left blank

Icon Key

This toolkit uses icons to help signify different types of information.



The Script: content that should be read aloud by the facilitator to the participants



Example Responses: typical participant responses to questions asked by the facilitator



Materials Needed: a list of all the materials that are required for an activity



Facilitator's Note: tips provided for the facilitator. They make the toolkit easier to navigate



FYI Lightbulb: a little extra information



Quotes: a quote from a key figure in Research Justice



Handouts: a section in the toolkit that is meant to be handed out to participants