

Research Justice Institute Training Series #1

Research Justice

For All

Facilitator's guide

**Training on the basics of research planning
Prepared by the DataCenter
November 2012**

What is Research Justice?

Research justice challenges structural inequities in knowledge production and access to information. As a transformative research agenda, it centers community knowledge and leadership in movements for social justice. DataCenter believes that research justice is achieved when communities are recognized as experts and are able to use all forms of knowledge and information to advance their own change agenda.

A Research Just world is one in which communities:

1. Are recognized as experts
2. Have equal access to and control over information that impacts the community
3. Have the capacity to produce research that reflects the community's experiences
4. Are able to use all forms of community knowledge to effectively advance their agenda

Towards this end, DataCenter is releasing a series of curricula to train organizers in the key areas of research. This curriculum is from our flagship training on empowering communities to reclaim research to support their efforts for social change. It combines 35 years of expert knowledge and resources into a series of training for disenfranchised communities to become the experts in their own social change solutions.

Using this Manual

This manual is intended for community-based organizations to build the skills and capacity of their staff and membership to implement their own research strategies. It consists of a series of workshops that build on one another to develop participants understanding of “Research Justice”. However, facilitators can feel free to pick and choose the workshops that are most relevant for their work given the limitations of time and capacity.

About DataCenter

DataCenter is a national research and training center that supports grassroots organizing for justice and sustainability through strategic research, training and partnerships. Research is an essential part of creating the knowledge required to enact change. Communities have first hand experience of oppressions, and research is a tool to package those experiences so that it can be used strategically to affect change. For example, domestic workers in New York documented working conditions in their industry and used the data to pass the first-ever statewide Bill of Rights. 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. Recent victories that have been supported by our research include the San Francisco Wage Theft Ordinance, free bus passes for low-income youth in San Francisco, and the launching of a local and statewide campaign platform by Long Beach Khmer youth (developed from findings from a participatory action research project).

Facilitator's Agenda with Descriptions

Below is a short agenda of the workshop with a brief description of each activity

The workshop is divided into three sections:

Framework

We are the experts! 20 min

This workshop is an initial framing piece and icebreaker that introduces participants to the basic concepts of research justice.

Inside Research Justice 30 min

This workshop includes an interactive exercise called “The Knowledge Factory” to demonstrate the way knowledge travels and influences our society and illustrate the unequal playing field that can exist within research.

Research for Organizing 30 min

1. Methodology
2. Research Planning

We are the experts!

Research Bingo and Flower Petal of Knowledge

20 minutes

The following exercise is an icebreaker to introduce participants to the basic concepts of research justice.

Goals & Objectives

- Redefine research & the idea of “expertise” on community’s terms
- Highlight research as a tool we already actively use in our daily live, know intimately well and is a tool to serve our needs.
- Understand the connection between the collective knowledge already in communities and the political power they’re trying to build – and how research can help make that connection

Agenda

Research Bingo	10 min
Flower Petals of Knowledge	10 min

Materials

- ✓ Research Bingo Handout
- ✓ Butcher paper that has a flower with three large petals drawn

FACILITATOR INSTRUCTIONS

👉 Pass out Research Bingo Handout

- 🗣️ You will have 5 min to go around the room and collect information to fill in the blocks on this grid. Each block has a question pertaining to someone’s experiences. When you find a person that the question is relevant to, fill in their name and the answer to the question. The first person who completes four in a row (down, across, or diagonal) wins and must yell out “bingo!” Note you cannot fill in a person’s name more than once. A qualifying bingo must have 3 different people.

Facilitator’s Note: The bingo is set up so that in each row or column there are three types of knowledge / gathering information:

1. Experience – learning by doing and experiences we hold in our bodies.
2. Community – when we learn from the people around us (elders, neighbors, friends, etc.).
3. Mainstream (or administrative / institutional information)— include newspapers, academic writings/reports, government information and so on. This will be reaffirmed in the flowers of petal exercise.

👏 When a winner yells bingo, have him/her come up and report back their findings. Ask participants to give a round of applause and engage them in the following discussion: What do all of these questions have in common?

🗨️ There are different ways that we get information, share stories, 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?

🗨️ We know naturally where knowledge lies- we know our community has access to knowledge that our government does not and vice versa, we also know the most effective method of extracting knowledge from our sources (ex: talking to our community vs. writing to them)

Summary

🗨️ In this society the “experts” control knowledge and information, but we believe anyone and everyone can and already do research in your every day life. This is not coincidental. Those in power do not want us to realize our expertise. Because when we leverage our knowledge, we can affect change. These workshops are intended to help us leverage our knowledge thru effective research – and the first step is realizing that you already have it in you! We are all doing research in our daily lives. All of us are already thinking on a regular basis 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!

Research Bingo!!

Have you ever...

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!'. Note you cannot fill in a person's name more than once or go diagonal.

<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 an issue in your community with your friends?</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 wanted to buy?</p> <p>Name:</p> <p>What did you learn?</p>

Flower Petals of Knowledge

- 🗨️ So all of the things we mentioned represent different types of knowledge...
- 👉 Display the butcher with the flower petal diagram. Engage participants about what kinds of knowledge go into each category. Ask participants for specific examples of each type of knowledge.
- 🗨️ There's **community & cultural knowledge**. Can anyone guess this means?
 - ☐ There is a lot of information we hold in our community – our elders, neighbors, friends and families hold a lot of information.
 - ☐ Where do we get this knowledge? Elders, songs/dances, ceremonies, festivals, etc.
- 🗨️ There's **experiential knowledge**. What is that and how do we get it?
 - ☐ What we learn and know from our personal experiences. e.g.,: experiences w/ racism, classism, sexism, etc., our observations of what's going on in community (environmental racism, police brutality, poverty etc.), our personal learnings, etc. It is information
- 🗨️ Finally there's **mainstream & institutionalized knowledge**. What falls under this realm?
 - ☐ What is considered “official” in society at large: published facts & data produced by research “professionals” usually from outside of the community. Ex: print media, university publications, etc.

Summary

- 🗨️ In our society, we usually defer to mainstream knowledge when we talk about “research” but it is important to explore all these types of knowledge if we want to understand the issues based on what we as community know, not just what institutions and dominant narratives tell us, and achieve real change from a place of our reality and analysis. So, it's important that we find ways to capture and organize our own community experience and knowledge. We know that we are experts in issues we're trying to address, but we need to learn how to leverage that knowledge as a political tool. This gets to the heart of research justice: telling our own stories and making our voices heard, so that as experts we make change happen.

Flower Petals of Knowledge Handout

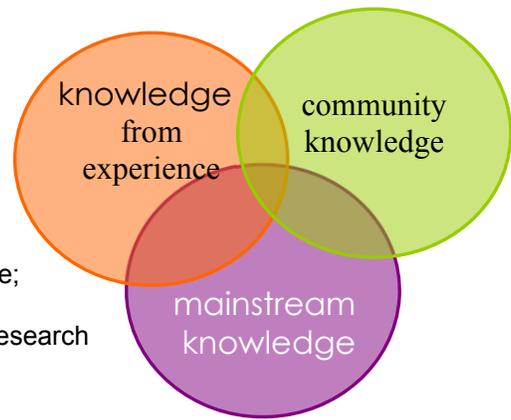
KNOWLEDGE & MESSAGING

DataCenter folks believe that “information” is made of three sets of knowledge

Community Knowledge—cultural practices and wisdom passed down from our community (elders, neighbors, friends, etc.).

Knowledge from experience— Our lived, day-to-day experience; what we learn and know from living and doing it.

Mainstream Knowledge—published facts & data produced by research “professionals” usually from outside of the community.



source: DataCenter

All three sets of knowledge 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 shift public opinion and make community-based social change.

Inside Research Justice

30 minutes

The following is a set of discussions that are aimed at introducing participants to the DataCenter’s framework of Research Justice. The exercise is designed to demonstrate the way knowledge travels and influences our society and to illustrate the unequal playing field that can exist within research where some voices/information is considered legitimate over others. The demonstration is also intended to generate conversation about a new paradigm of a “research just” world.

Agenda

Whose Got the Power?	10 min
Inside Research Justice Tool	15 min
Summary	5 min

Goals & Objectives:

- Identify structural inequities in research that maintains certain power relationships
- Illustrate importance of impact of PAR as strategic tool that breaks down barriers to knowledge and shifts power

Materials

- ✓ Butcher and Markers
- ✓ Inside Research Justice Grid on butcher
- ✓ Images enlarged and cut & tape
- ✓ Inside Research Justice handout

Prep & Setup

- ✓ Have images enlarged and set out with tape and markers for drawing

FACILITATOR INSTRUCTIONS

Introduction: Whose got the power?

- ☞ Ask participants to recollect if they’ve ever been to a city council meeting or public hearing. Ask for one or two people’s experiences with influencing the decisions made. Read off the following statement:

A family who lives near large agricultural fields suffers from asthma caused by the pesticides and pollution. The father reports this in a presentation to the local city council. He is dismissed by the city official saying there is no connection between his son’s asthma and the fields.

The following month the Environmental Protection Agency 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 that immediate action should be taken.

- ☞ Discuss the following:

- 🗣️ How was the community voice regarded? Why?
- 🗣️ How was the institutional voice regarded? Why?
- 🗣️ Who are the people in power most likely to listen to? Why?
- 🗣️ Engage participants of what they think “research injustice” is and reveal DataCenter’s definition on butcher:

Butcher: DataCenter’s Definition of Research Injustice

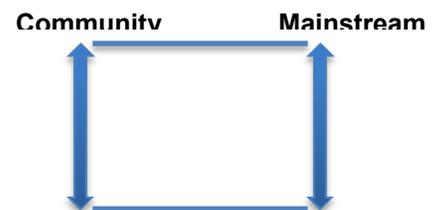
1. Community voices and experience are dismissed or ignored.
2. Information is inaccessible, whether through jargon, cost money, hidden in databases, not translated, etc.
3. Narratives exclude or misrepresent community experiences and yet decisions about the community are made based on those narratives.
4. Lack of community control over production, documentation, and possession of their own data (and stories).
5. Lack of control over how the data is used.

🗣️ In our society, those whose knowledge is valued as “legitimate” often have the power to influence. People view the research and methods of institutions and professionals as valid and authoritative and information from non-institutional (community) sources as invalid and less reliable. Often times we ourselves don’t value our own knowledge as legitimate and essential for planning and decision-making in government and community life. Or, we do value our own experiences but the experience is dismissed and we are told that there is no proof or our experience is ignored and our experience isn’t seen as having credible knowledge of relevance to share. But we know that in order to make any real changes in the institutions that impact our lives, we need to transcend this inequity.

The Inside Research Justice Tool Overview

- 🗣️ For this exercise you will be walking through a visual representation of how information is accessed and produced and disseminated. We call this the the process of achieving Research Justice.
- 👋 Introduce the Axes Diagram. Describe the different quadrants and how they each represent different political sectors. Ask participants to brainstorm for each quadrant examples of who falls under that category.

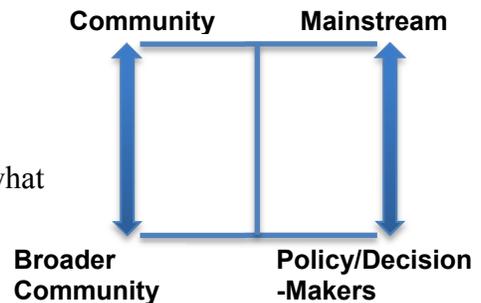
- **Upper left corner = Community:** the core group of people driving the campaign and/or affected by the issue
 - **Upper right corner = Mainstream Institutions:** government agencies, universities, corporations,
- Sources of knowledge** →



- The lower quadrants are where you want the knowledge to flow. That is your target audience, i.e. the people who are educated, influenced, and empowered by your research. The corners of the chart represent where knowledge is located. The arrows represent how and where knowledge travels. The line

👉 Draw a vertical line down the middle of the diagram.

- **Lower left corner = Community:** the broader community (includes others affected by issue & allies)
- **Lower Right Corner=Policy/Decision-Makers:** people/institutions w/ political power to give us what we want



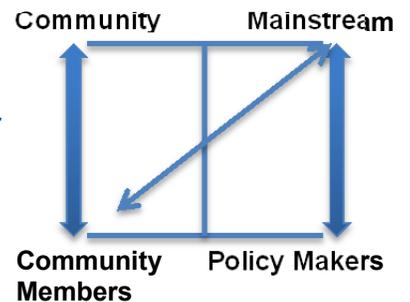
- The corners of the chart represent where knowledge is located. The arrows represent how and where knowledge travels. The line down the middle marks the barrier the left side (community) often faces in receiving and giving knowledge to the right side (mainstream). Any questions?

Inside Research Justice Demonstration

- **Community to Broader Community:** Our communities create and use new knowledge everyday. It is located in our history and experience and expressed in both our cultural traditions and political action. We share this knowledge seamlessly in order to survive. What are ways we do this? What are tools we use to ensure knowledge travels inside our community?
- 👉 Ask each participant who gives a response and place up the appropriate laminate piece. If there isn't a piece that describes it, ask them to draw it on the diagram.
 - Example responses: Cultural events, oral traditions, theater, the arts, organizing in neighborhoods or workplace, ethnic newspapers, flyers, etc.
- We have different ways we share stories and information in our communities. Through stories, arts, talk story, we talk to each other about what is happening in our community.
- **Mainstream to Policy/Decision makers:** Government institutions, corporations, agencies, churches, schools, and organizations rely primarily on traditional institution-based research. They trust this knowledge, and generally do not seek non-traditional sources (except when they need something from our communities like our vote or purchasing power). What are ways that knowledge is given to those institutions from the official experts?
- 👉 Ask each participant who gives a response and place up the appropriate laminate piece. If there isn't a piece that describes it, ask them to draw it on the diagram.
 - Example responses: government reports, academic studies, police reports, news coverage, census, policy briefings, press conferences, news media, consultants, etc.

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

☞ **Mainstream to Community:** The community also needs institutional information. But often it does not have access to this information- even when it concerns the community itself. Sometimes research is only available for sale and is expensive. Sometimes it is written in inaccessible language. 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**.



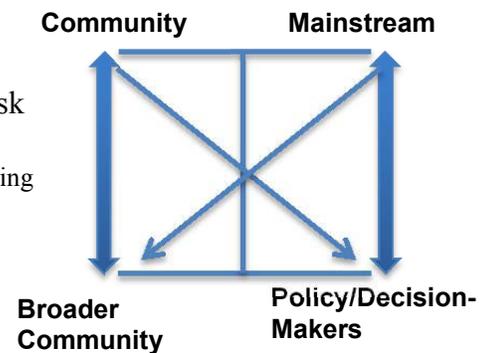
☞ Draw a diagonal arrow from the upper left quadrant to the lower right quadrant.

☞ **Community to Policy-Makers:** Community voices are not heard, and community stories are often dismissed as anecdotal. But we need to fight to be at the decision-making table. The second arrow represents **our right to be heard**. What are ways we have historically reached the policy makers?

☞ Ask each participant who gives a response and place up the appropriate laminate piece. If there isn't a piece that describes it, ask them to draw it on the diagram.

- Example responses: community surveys, town halls, reports, writing letters, media events, etc.

☞ The Inside Research Justice tool reveals the paradigm of research injustice in which we live today. But we are trying to break that paradigm. What is research justice?



☞ Take a few responses. Reveal DataCenter's Definition of Research Justice

BUTCHER: RESEARCH JUSTICE

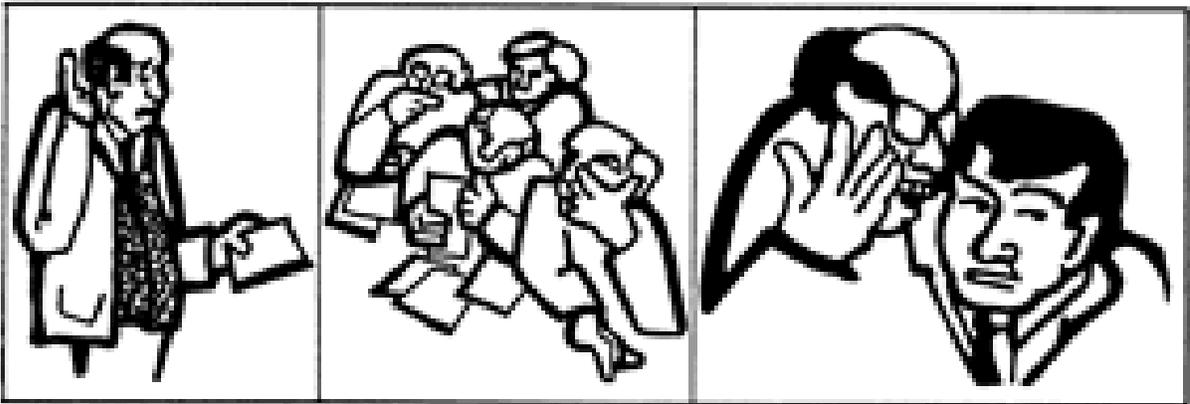
1. Recognition of community as experts (someone who is seen as having knowledge that is essential to problem-solving; and is recognized as such widely.
2. Equal access to information that impact the community
3. Control over information
4. Capacity to produce knowledge that reflect the community's experiences
5. And, capacity to use all forms of its knowledge to effectively advance their agenda

Summary

- By breaking down the barriers that often keep us from being heard and having access to knowledge from the mainstream, we can advance research justice. Communities exercise both their Right to Know – gathering strategic, tactical research that supports their claims and their Right to be Heard – using research tools to document what is happening in their communities. This allows us to build stronger, more powerful campaigns by giving voice to the most marginalized communities, expose contradictions between what mainstream decision-makers say and do, and confront policymakers with substantial, thoroughly researched data that supports their claims.



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¡BASTAYA!

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Organo informativo pro liberacion de la gente Latino-Americana
Informational news organ for the liberation of LA RAZA

P.O. BOX 40040 S.F. CALIF.

40 FAMILIAS HECHADAS DE SUS CASAS

40 FAMILIES EVICTED FROM THEIR HOME



40 FAMILIAS HECHADAS DE SUS CASAS
Fueron hechadas 40 familias de sus casas al momento...



United States™ Census 2010

**INSERT INSIDE
RESEARCH
JUSTICE HANDOUT
HERE**

Research for Organizing

30 minutes

The following is a set of discussions to link the role of research as a key component of organizing work.

Goals & Objectives

- Shine light on the use of research as a political tool.
- Introduce concepts of “research justice” and intersections between research and organizing

Agenda

Pair Share Discussion	5 min
Anatomy of Organizing	10 min
Research for Action	10 min
Summary & Closing	5 min

Materials

- ✓ Butcher Paper & Markers
- ✓ Butcher: DC Definition of Research Injustice
- ✓ Handout #1: Anatomy of Organizing
- ✓ Handout #2: Stages of a Campaign

Set Up

- ✓ Set up butchers for discussion pieces

FACILITATOR INSTRUCTIONS

Pair share -

🗣️ How can we use research as a social change tool?

👉 Take a few responses until you are able to point out connection between research & organizing.

- Example responses: we use research to equip ourselves with making our case for change, research helps us understand the problems we face so we can change our situation, etc.

Summary

🗣️ Research is political. It is a tool for us to shift & confront power and influence those who make decisions about our lives. If we do not use it, those who want to maintain their power will. Research is also transformative. When communities engage in a process of inquiry, they can never go back to the way things were. Once we learn about the roots of our oppression we are moved to change our material conditions. “Decolonizing” research is about using our knowledge to liberate ourselves. It is about conducting our own research for our own ends.

Anatomy of Organizing

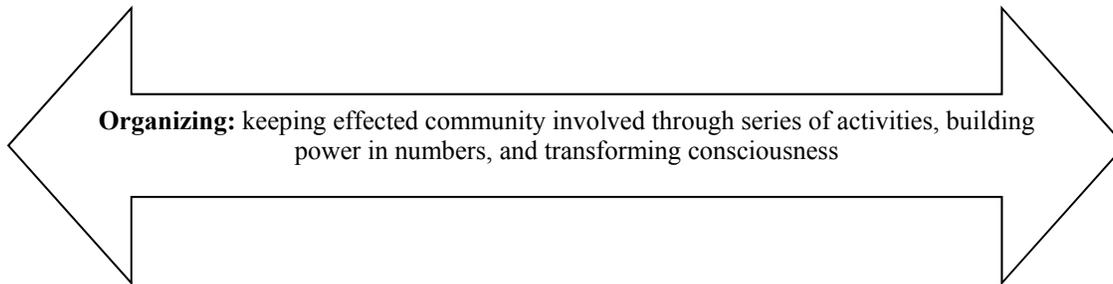
🗣️ Unfortunately in our society, research has often been used as a tool of domination by those who want to maintain unjust power relationships. We call this research injustice.

- 🗣️ We do not simply seek knowledge for the sake of knowledge—we want to act on it to change the world. In order to build towards our vision of a better world, we involve our communities in identifying the solutions. We do this by organizing:

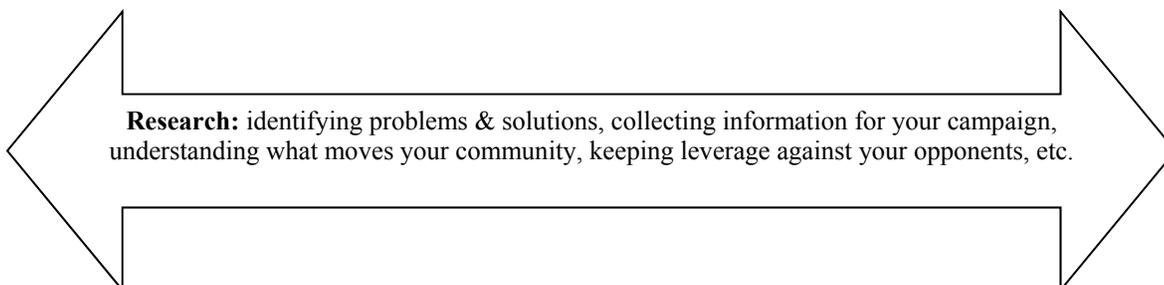
bringing people together in a coordinated way to build collective power in order to achieve social change. `

- 👉 Pass out handout # 1. Introduce the concept of organizing and its components. Talk about how both research and organizing fit into building collective power through organizing.

Anatomy of Organizing



<p>Base-Building Recruiting and retaining large group of members of impacted community to participate in and help direct and implement the work of your organization</p>	<p>Grassroots Leadership Development Developing the political analysis and practical skills of members of your organization to enable them to build your base, fight in campaigns, and build your organization</p>
<p>Campaign-Building Building sustained fights to win concrete policy and institutional change on issues that impact your community.</p>	<p>Organizational Development Building capacity, resources, and infrastructure to sustain healthy and effective base-building, leadership, & campaigns.</p>

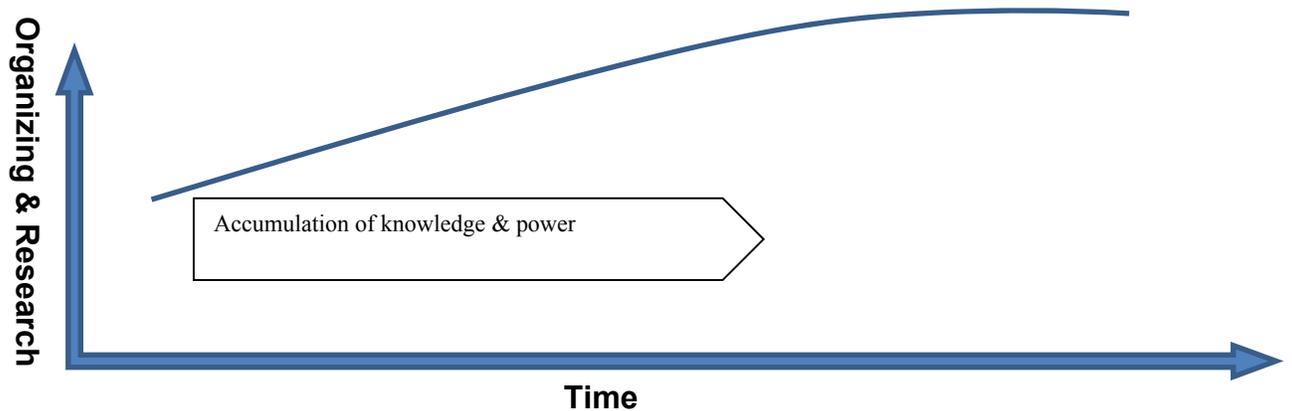


Research For Action: Four Stages of a Campaign

👉 Pass out handout #2. Walk through the 4 stages of campaign development. Reveal an image of a spiral curve on butcher and describe the cumulative process of learning & transformation in a campaign.

- 🗨️ Throughout the life of a campaign, you will have to repeat these steps many times. After you've completed a round of stages, it looks as if you're back at Stage 1, but you're really NOT! Having gained knowledge, wisdom, and the actual experience going through the cycle once, your capacity is not the same as when you first started. The spiral image captures this cyclical, and yet cumulative, process. Like building blocks, each piece of knowledge is important in campaign development so that your community is moving upward and is informed, armed, and thus ready to be at the forefront of the struggle.

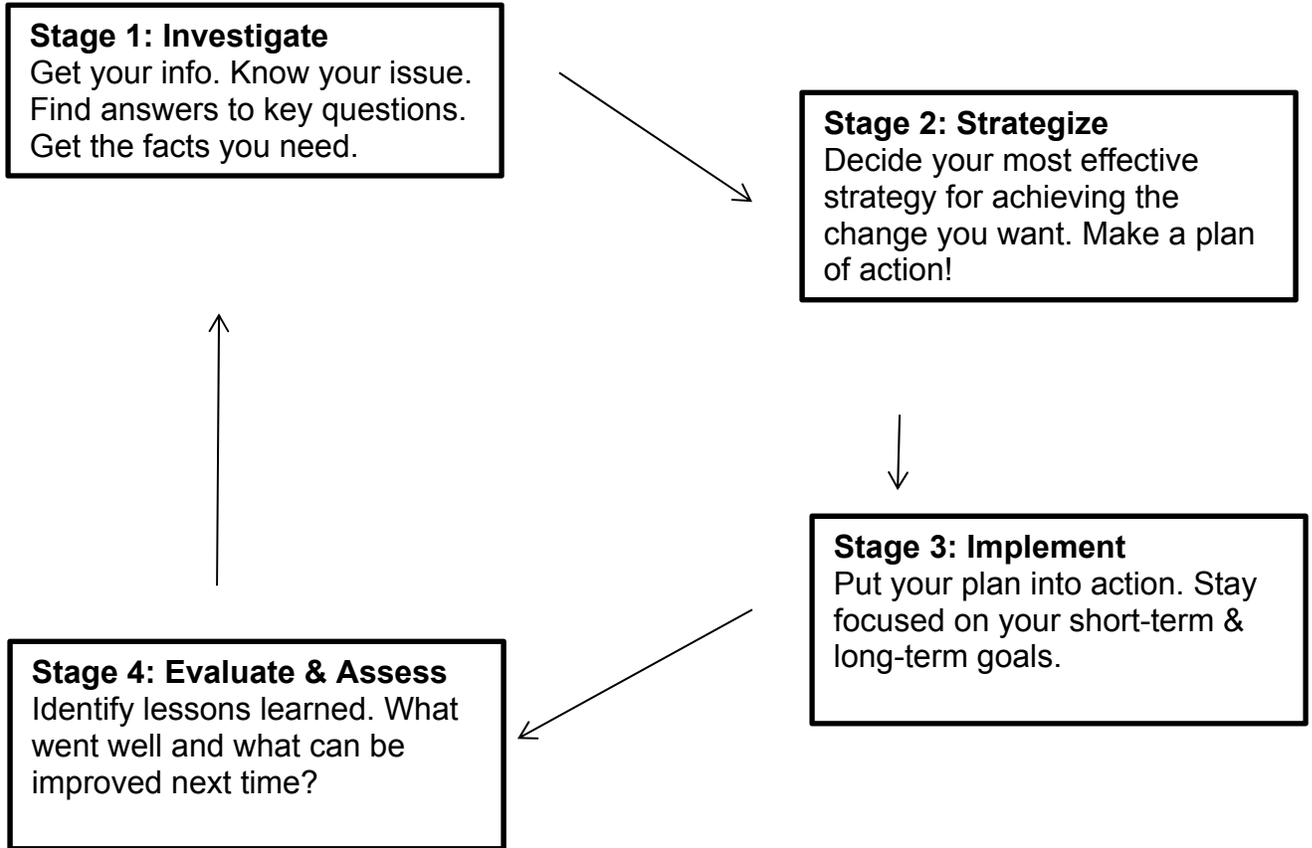
BUTCHER: Campaign Arc of Escalation



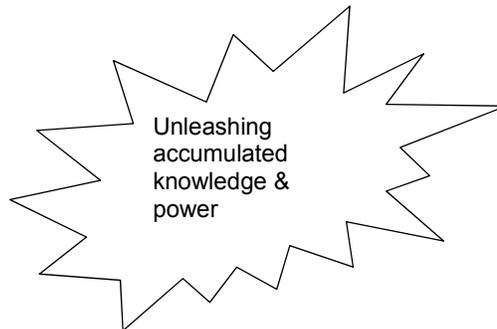
Summary

- 🗨️ Historically we often see that 'research' refers to the way that people with power have appropriated indigenous knowledge & resources for the purposes of domination and control. Recognizing the oppressive history of research, our goal is to redefine research as a fundamental tool for putting power back in the hands of the people. Just as we saw in the research bingo and flower petal exercise, we are already doing research, we are already experts of what is happening in our communities. **Research for action** is about putting into active, strategic use, the accumulated knowledge and power in our communities, so that we can effectively fight and win real changes in our lives with powerful ammunition/tools in our hands. Most importantly it's about growing and learning together in the process of inquiry and action.

Four Stages of a Campaign



Repeat stages 1-4 throughout the life of a campaign. Go back to any of the stages if necessary before moving onto the next round.



Understanding Research Methods: Crockpot

25 minutes

This exercise is an interactive opening that 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 (of the soup provided here) to the experiences of participants.

Goals & Objectives

- 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

FACILITATOR INSTRUCTIONS

- ☞ We’re going to cook some soup together. What ingredients do you put in your soup?
- ☞ Show a picture of a crockpot. Have participants come up and draw different types of ingredients in the crockpot. Ensure that that they include ingredients of different sizes.
 - Examples: veggies, large noodles, diced onions, meat, etc.
- ☞ What are the different textures of soup?
 - Examples: thick, watery, many contents, etc
- ☞ What utensils would you use to get the soup out of the crockpot?
 - Examples: ladle, spoon, fork, chopsticks, etc.
- ☞ 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 they have to name other tools, like chopsticks, fork, spoon, etc.
- ☞ The soup in the pot represents the **source**, i.e. where you go to get your information. The source you choose will depend on what kind of information you want. The utensils you described represent the **tools**, i.e. the instruments we use to extract the information we 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?
 - Examples: shallow vs deeper bowls, pour slowly so you don’t spill, stir so you get the heavy beef chunks, etc.

- ☞ The way you get the soup out 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.
 - Examples: source- community (stories, anecdotes, data), article, public documents, etc.
 - tools- Surveys, observations, internet, interviews, etc. method- survey vs interviews or both?
 - How many people will you interview? How will you do it?

- ☞ Pass out “Choosing your Methodology” Handout to participants. Point out any examples of Source, Method, & Tools that they missed. Check for final understanding.

Summary

- ☞ The crockpot 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 will be dictated by what types of knowledge we 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 our audience.

Understanding Campaigns and Campaign Research

40 minutes

This training is a series of exercises that help participants understand how different methods of secondary data extraction can be transformed into participatory tools. Participants will discuss different kinds of research involved in building strong organizing campaigns. Facilitator should emphasize that all these tools, including corporate research, are meant to involve community members.

Goals & Objectives:

- Introduce various campaign strategy tools to participants
- Understand the importance of research in strategy formulation
- Explore creative ways to make more traditional research methodology participatory

Agenda

1. Introduction to Campaigns (10 min)
2. Campaign Strategy Exercise (15 min)
3. Boxing in Your Target (10 min)
4. Summary (5 min)

Materials

- ✓ Butchers & Markers
- ✓ Campaign Terms
- ✓ Campaign Strategy Exercise

FACILITATOR INSTRUCTIONS

Introduction to Campaigns

☞ Research is a crucial part of building strong effective campaigns. In addition to helping us be strategic in our fights by understanding the political landscape we are working in, it gives our communities political leverage to prove that our position on an issue is legitimate. *What is a campaign?*

👏 Solicit a few responses until you can summarize the following definition:

A campaign is a plan, which has a strategy, with a series of sustained and coordinated activities to win changes on a particular issue.

☞ A campaign has to have a strategy—a systematic plan for how to build your power, which will ultimately drive your tactics of how to pressure decision-makers into giving you what you want. When we decide we want to take on an issue that we want to change, we need to do a lot of preliminary research in order to determine the most effective strategy. Let's go over some campaign terminology first...

- 👉 Go over the terminology fairly quickly. Explain that in the beginning of campaigns, many of these things are unknown and need to be researched.

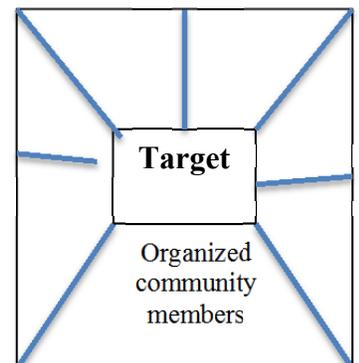
Campaign Strategy Exercise

- 🗨️ In order to gain a clear understanding of the issue we are working on, we must first come up with the right research questions to arrive at the information necessary to gain that understanding. We're going to practice doing a preliminary campaign strategy exercise that helps illustrate what gaps of knowledge we may have to fill, in order to be able to develop a winning campaign strategy.
- 👉 Pass out scenario and read scenario together. Break people into groups of 4-5. Give people 5-7 minutes to fill out worksheets and discuss their strategy for the campaign. Bring back into larger group and have each present (if there is time) or ask for volunteers to talk about their experience of filling out the campaign strategy chart.

Boxing in Your Target

- 🗨️ There is currently another trend that many community and labor groups are following. A popular understanding of a traditional campaign model used to be that if enough community members got together and confronted the decision-maker, it would be enough to win. Over time, we have discovered that decision-makers don't respond as easily and that our campaigns would have to be more creative in order to create enough pressure. Now we're going to talk about "secondary research" that we use to put pressure on our target to respond to our demands.

- 👉 Draw a diagram of a big box. Put the target in the middle. You can use a real decision-maker or the fictional mayor in the scenario. Put "organized community members" at the bottom.



- 🗨️ Our goal is to create a scenario in which the political cost of not doing what we want is more than her perceived cost of doing it. For instance, if you are trying to get your mayor to pass a law, you want to find everything about your target that will make him/her submit to pressure. What is his/her self-interest? Who does he/she listen to? What does he/she feel most threatened by?

- 👉 Ask participants to identify who/what the target cares about in the diagram of what might pressure him/her to move your plan into action. Make sure the following are listed and place them in the quadrants to simulate the idea of pressure coming from many different directions:

If Political Target: Media Other Gov't Agencies Party Officials Other Communities City Staff Donors/Endorsers Challengers Voters	If Corporate Target: Media Consumers Investors Politicos Competitors Regulatory Agencies Elected Officials Corporate Management/CEO & Board of Directors
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🗨️ What kind of research questions might you ask about each of these players? And what are ways to involve community members in this research?

👉 Solicit ideas until participants get a real understanding of why each of these players would could effectively pressure the target. Emphasize that the “organized community members” remain a powerful foundation for an effective campaign – they embody THE central political force which is essential in moving a campaign.. If you broaden the issue wide enough to incorporate these other players but alienate the community, the campaign can crumble. Therefore it is imperative to involve community members in this kind of research so their leadership and analysis continue to be informed through the campaign effort.

Summary

🗨️ Campaigns are important tools to engage members in a series of coordinated activities that build pressure on a target to give us what we want. Without knowing our target and the political landscape we are up against, we won't have effective campaigns. When we go public to put pressure on our target, we need not only have the ammo of people power but also the ammo of information to accurately assess the power structure we seek to alter, as well as legitimize our case. Campaign research activities are important tools to keep your members engaged and fighting in the campaign. Engaging community members in the process of inquiry can be a transformative experience. Members stay invested in the fight when they are seen as legitimate stakeholders with knowledge on the issue.

Exploring Participatory Action Research Tools

40 minutes

This training focuses specifically on PAR tools as an important tool for organizing communities. While participants will brainstorm many different methodologies for knowledge extraction, this training will focus on the three most popular PAR tools: surveys, interviews, and focus groups, and explore each of their advantages and limitations.

Goals & Objectives

- Get exposed to various PAR tools
- Compare core PAR tools and understand their advantages and limitations
- Explore the challenges of implementation of PAR tools

Agenda

1. Introduction (5 min)
2. Core PAR Tool Comparison (15 min)
3. Small Group Exercise (15 min)
4. Summary (5 min)

Materials

- ✓ Butcher & Markers
- ✓ Tape
- ✓ PAR Tools Handout
- ✓ Scenario Exercise Handout

FACILITATOR INSTRUCTIONS

Introduction

- ☞ We are going to spend some time talking specifically about tools that help us reach our organizing goals. What are tools we have seen that help us extract information by engaging our communities?
 - Responses; surveys, interviews, focus groups, community mapping, photo blogs, etc.
- 👏 Brainstorm responses on butcher and ask participants to describe each tool they bring up until you get good descriptions. Summarize definitions for each one. Pass out PAR tools handout for final definitions and descriptions.
- ☞ How can each of these tools be useful in our organizing?
 - Example responses: recruitment, building relationships with the community, finding out what matters to the community, learning more about the problem we're trying to address, etc.

Core PAR Tools Comparison

☛ While there are many tools we can use to engage our communities and extract valuable information, we're going to focus on the three popular tools that have been used in various campaigns.

☞ Take surveys, interviews and focus groups and put them on a grid with 3 columns. Have folks talk about the advantages and limitations for each tool. See PAR tool comparison summary as a guide. Fill out as much with the group as you can.

	Surveys	Interviews	Focus Groups
Advantages			
Limitations			

Small Group Exercise

☛ When choosing our methodology, there are a lot of factors we have to take into consideration. Some factors are simply about capacity and others are about which method will resonate most with our communities. The following exercise highlights some considerations we may take when choosing our methodology.

☞ Pass out small group exercise handout. Read the scenario and directions together. Ask for clarifying questions. Split people up into 3 groups. Assign each group to survey, interviews, and focus groups. If you have a larger group and need more groups, you can add more tools. Groups will have 5-7 minutes to discuss. Ask each group to quickly highlight what their group discussed. Capture highlights on butcher. Ask for any final thoughts and summarize.

☞ Pass out samples of a) research goals (what info do we need? What evidence do we need? Etc.) and b) organizing goals (like community members are aware of their experiences being critical part of their expertise, community has a shared analysis of problem and solutions, they have ownership of PAR as chosen/best strategy to be recognized as experts, etc.) – and folks can go in small groups to discuss which goals (of both types) might go with which methods or tools – or something

Summary

• The relationship between our research and our organizing is critical. With our research hats on, we have to be thinking critically of what the data limitations are and with our organizer hats on, we need to be balancing that with which tool best gets us to our organizing goals. There is no right or wrong answer for which research tool we should use. Each has its advantages and limitations. To make our findings full proof, at times we need to combine tools and at other times we need to focus deeply on one tool. This will all depend on our overall goals, audience, capacity, and timeline. Talking about the challenges are important so we can be prepared for when they arise and have tight planning around our method when using each tool. When we implement our tool, we will go through many stages including testing the tool, assessing, and going back out and implementing again. We get to learn and grow and improve our methodology along the way.

Framing your Research: Headline Exercise

40 minutes

This training is intended to help participants determine and plan their research strategically and effectively. The headlines exercise engages participants in mapping out their methodology from start to finish.

Goals & Objectives

- Learn about how sources, method, and tools (SMT) fit into the overall stages of research
- Understand importance of goal-setting as driver of research methodology
- Practice framing the issue and thinking about target audiences

FACILITATOR INSTRUCTIONS

Introduction

- ☞ The most challenging part of research is figuring what information to go after in the vast universe of knowledge out there. Everyday we are bombarded with all sorts of information, whether its from the media, our community and families, or school. In order to figure out where to start, we need to know where we want to end on our roadmap to change.
- ✎ Reveal an empty diagram with only stages 2 & 4 filled out with identifying sources, method, and tools. Point out the circular nature of the diagram with outcomes connected to goals. Ask participants if they know what the last and beginning stage might be. Take responses until folks get an understanding that research is driven by the goal. Your SMT will be determined by who you want to move and what change you want to see. Remind people of the purpose of research for action: to impact change (provide solutions to problems).
- ☞ If our research is used to leverage our case about an issue in our community, then we need to move people to care in order to change something. The following exercise is a helpful way to think about our final outcome in order to give us a starting point.
- ✎ Break people up into 4 groups and pass out Headlines Exercise Directions. Pick an issue that is relevant to the group you are working with and tell participants they will be tasked with creating a headline about the issue. Read off the directions as a group. Ask for questions and clarifications. Tell participants to assign a note taker and time keeper. They will have 5-7 min to come up with their headlines. Have them record their headlines on

Agenda

- Introduction (5 min)
- Breakout Groups (15 min)
- Report Back & Discussion (15 min)
- Summary (5 min)

Materials

- ✓ Butcher & Markers
- ✓ Headlines Exercise Directions
- ✓ Sources Methods Tools Handout
- ✓ Stages of Research Handout
- ✓ Laptop w/ wifi access (optional)

butcher paper or (optional) while they are in their groups rove the groups and collect the headlines to plug them into newjack.info.

👏 Present the headlines (group report back or on website & projector) As a group look at the different headlines and vote on which one is the most impactful. Once your group has decided on a headline.

- 🗣️ What is the underlining message behind this headline?
 - For example: Is it about pushing for policy change? Exposing labor violations? Documenting what life is like for your community? Inciting moral outrage?

👏 Engage folks in a discussion and have them brainstorm what goes into each stage. As you walk them through each question, fill in the stages of research in the big diagram up to sources, methods, & tools:

- 🗣️ How does the headline inform the goals of your research? What are your goals in this case? And who are you trying to reach? (I.D goals and target audience)
- 🗣️ Based on these goals, what data would you like to capture? (I.D. data)
- 🗣️ In order to be effective, when do you want to release this data? What kind of capacity do you have to make it happen?(I.D. timeline & capacity)
- 🗣️ Given all of these factors, what are your sources methods and tools (I.D. SMT)
- 🗣️ Once we implement our method for getting data, what do we do next.? How do we get closer to our headline? (Analyze data, craft message)
- 🗣️ Then what do we do with our message? How do we get it out there? (Deploy your info ammo!)

👏 Pass out Stages of Research Handout (filled out diagram).

Summary

🗣️ Our end game is the most important step to figuring out how we begin. If we skip right to jumping into research without a plan, we are not strategic or effective. Our goal is to coordinate our research project on the same timeline as our organizing campaign and think about how it will provide us leverage. This means we want to be armed and ready with our info ammo when we most need it. This can be when decision-makers are going to make an important decision related to our issue, when our issue is a hot topic and can shape public opinion, or when we have built enough visibility as an organized force to push our issue. Having a plan that takes our timeline and capacity into account is key. Finally, creating headlines is important practice because it engages us in thinking about our target audiences and what messages move the hearts and minds of people. We can discover really interesting data but if we can't translate it into something that actually compels people to act (both our community and the decision-maker) then we will not achieve our goals.

Creating your Research Plan

40 minutes

This workshop is an introduction to research planning to help participants understand all the elements of a research plan. Facilitator should emphasize that there is no cookie-cutter order for the different stages of research plan but that effective researchers are ones who can map out a plan that includes bigger picture goals and get down to smaller details that takes into account elements like timeline and capacity.

Goals & Objectives

- Solidify understanding of the order in which research is planned
- Explore more deeply how to approach research project planning
- Get practice creating survey project plans with timelines and roles

Agenda

Stepping Stones	10 min
Roles Matrix	10 min
Research Planning Exercise	15 min
Summary	5 min

Materials

- ✓ Butcher Paper, Markers & Tape
- ✓ Stepping stone cards
- ✓ Project Steps handout
- ✓ Survey Project Planning Handout

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.

Stepping Stones

👏 Divide participants into groups of 3. Distribute a set of task cards to each group. Instruct them to post the cards in the correct planning sequence below the lines posted around the room. Encourage them to work together in dialogue to determine their answers. The flip chart should look like the example below:

 = 'stepping stones' task cards

Survey Plan



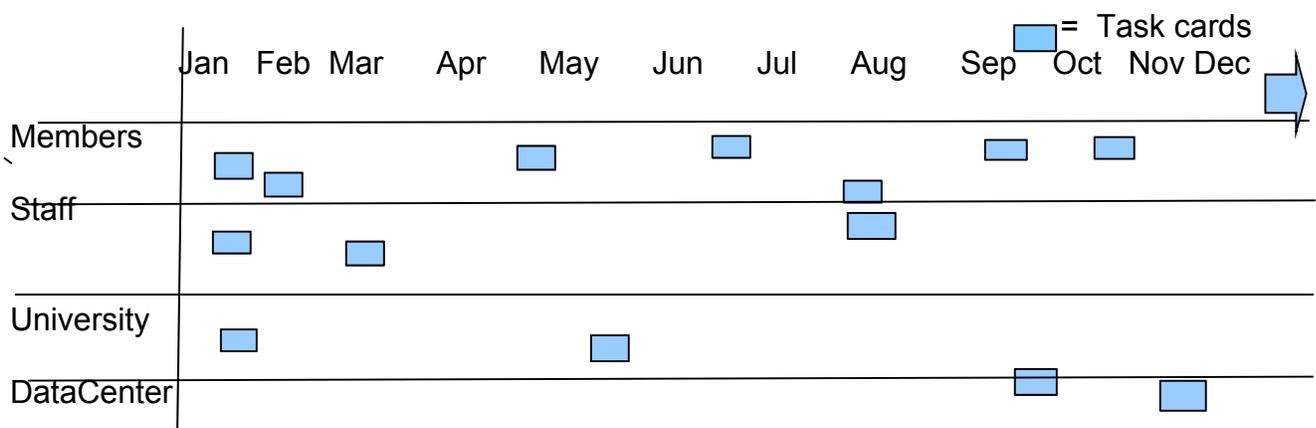
👏 Bring the group back together and compare the different plans as a group. Engage the group in the following discussion.

- 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?
- 👏 Summarize the discussion. Ensure that participants understand that there isn't necessarily one way to do it but that it is important to think about why they order things in the way they did. Pass out handout that breaks down a basic order of planning a survey project and the categories each stage falls under (i.e. plan, develop & conduct, analyze, distribute).

Roles Matrix

- 👏 Pick one of the charts. Divide the line into months. Create a matrix designating project workers and timeline. Calibrate task cards to match appropriate dates/schedule.



- 🗨️ Let's discuss and examine the tasks, who does them, when they are to be done, and why. For some steps, the task is to DECIDE or GUIDE. For others, the task is to DO or IMPLEMENT. *What are the differences between these?*
- Responses: some about planning/strategy & making assessments, others is about implementing the tool
- 👏 Move tasks around. Pick out a few key tasks in each stage and ask participants who would do it and why. Ask them to describe what each task might look like and how it would be carried out.

Research Planning Exercise

- 👏 Pass out the FREE campaign scenario. Have participants break into small groups to do a mini survey project plan for their 3-month timeline using the research planning worksheet. 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 kind of survey can be achieved in a 3-month timeline?

Summary

- 🗨️ Having a birdseye view of all of 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 an in-depth research process.

Starting your Own Research Project

40 minutes

Participants should now be ready and equipped to create their own research plan! The goal of this exercise is to allow participants to apply all the aspects of research methodology and planning they have learned and incorporate it into their own research planning project.

- By now we hope you are able to create your own research plan from start to finish.

- ✎ Split participants up into groups and have them work on “Starting your Own Research Project” Worksheet. Walk around and help each group with the various questions. After 20 minutes, bring groups back to bigger group and debrief.
 - How was the process for you?
 - What was challenging?
 - Moving forward, what is necessary to ensure a research project like this will be successful.

- ✎ Help participants identify next steps to pursue their research project. Refer to participants to DataCenter resources.