



Research for Organizing Webinar Series

Module 2: Designing your Research Project

Presenters

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Research and Policy Associate



Agenda

- Logistics
- Who we are
- Upcoming Webinar Modules
- Developing Research Goals and Questions
- Choosing your Research Method
- Developing your Research Plan and Timeline
- Putting together an advisory board
- Case Study
- Q&A



Webinar Logistics

- **Audio Options:**

- **Listen by phone:**

- Select “telephone” in the audio option on the control panel.
 - Call the number sent to you in registration confirmation
 - Enter your access code
 - Enter your audio pin (press # [code numbers]#) so we can identify you.
 - Pin will be shown on your screen when you log in online.

- ***Or, listen through your computer’s audio.***

Everyone but the presenters will be muted to reduce background noise.



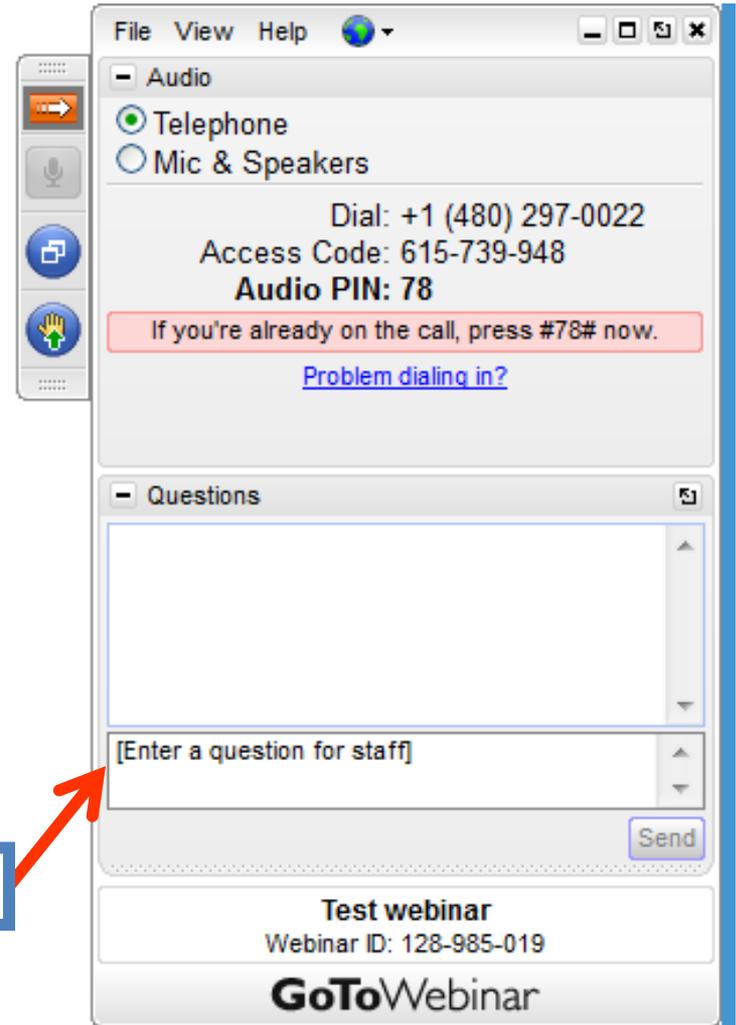
Webinar Logistics

Questions

- As we go through the webinar, if you have any questions, you can type them into the chat box
- We will answer questions after the webinar during the Q&A session



Your questions here!



INTRODUCTION TO THE COMMUNITY DEVELOPMENT PROJECT (CDP)



Who is CDP?

- Strengthen impact of grassroots organizations, through...
 - Participatory Action Research Reports
 - Grassroots Policymaking
 - Popular-Education Curriculum Design and Research Training
 - Strategic Campaign Research



**Find out more information about CDP here: <http://cdp.urbanjustice.org/>

CDP Partnership Model

- Prioritize working with groups that...
 - Are based in low-income/excluded communities in New York City
 - Conduct community organizing campaigns with a goal of achieving systemic change
 - Are membership-based, member-led
 - Engage in leadership development and base-building activities



Research For Organizing Webinar Series

- [Module 1: Unpacking the Toolkit](#)
- **Module 2: Designing your Research Project**

Moving Forward:

- Module 3: Getting Your Data
- Module 4: Creating, designing, and implementing Surveys – Quantitative Data



Research For Organizing Webinar Series

- Module 5: Focus Groups & Interviews – Qualitative Data
- Module 6: Mystery shopping/observations
- Module 7: Creating research findings and Policy Recommendations
- Module 8: Presenting & Releasing your Research



MODULE 2: DESIGNING YOUR RESEARCH PROJECT



Objectives for this Module

- *Participants will be able to...*
 - *Put together research questions informed by research goals*
 - *Use research goals to choose research methods*
 - *Develop a research plan and timeline*
 - *Understand the use and benefits of advisory boards*

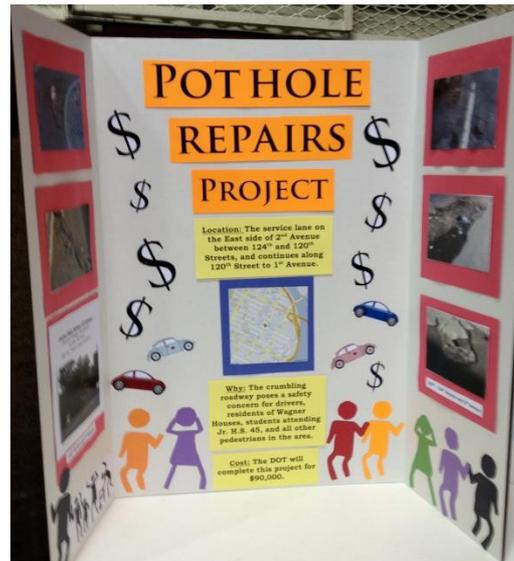


INTRODUCTION TO PARTICIPATORY ACTION RESEARCH (PAR)



Participatory Action Research (PAR)

- People-centered
- Power-building
- Action oriented



RESEARCH FOR ORGANIZING (RFO) TOOLKIT



Research for Organizing Toolkit

- Designed for organizations using PAR in social justice work
- Compiled from years of working with grassroots organizations
- Trainings, tools and tips created for organizers & community members to become more actively involved in research process



Research for Organizing Toolkit

RESEARCH FOR ORGANIZING A Toolkit for Participatory Action Research from the Community Development Project

[SIGN UP FOR OUR MAILING LIST](#)

HOME TABLE OF CONTENTS ABOUT THIS TOOLKIT

Timeline of a PAR Project

An Overview of Participatory Action Research

Designing Your Research Project

Getting Your Data

I. Surveys

II. Interviews

III. Focus Groups

IV. Community Mapping

V. Community Visioning

VI. Mystery Shopping

Entering Your Data Into a Database

Analyzing Your Data

Presenting and Packaging the Report

Releasing the Report

Glossary of Terms

Tips for Facilitators

Download the entire guide as a PDF

Descarga secciones en español

Step-by-step Timeline of a Participatory Action Research Project

Case Studies

Example Activities

Example Tools

TOP

Step-by-step Timeline of a Participatory Action Research Project

Releasing the Report

Participatory Action Research



www.researchfororganizing.org

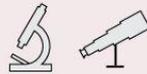
What do you think is the first step in designing a Participatory Action Research Project?



Developing Research Goals and Questions



Choosing Your Research Method



Developing your Research Plan and Timeline



Putting together an advisory board

Research Goals & Questions

- Help frame what you are trying to accomplish with your research
- Focus on the bigger picture social change goals and how research helps you achieve those goals



Tool 2.1: Guiding Questions for Developing Research Goals and Questions

DOWNLOAD TOOL 2.1

DESCARGA HERRAMIENTA 2.1 EN ESPAÑOL

Tool: 2.1 Guiding Questions for Developing Research Goals and Questions

WHAT...

...is the social or policy change you want to bring about at the end of the day?

...are your organizing goals, and how can this research be helpful achieving these goals?

...information do you need to better understand and document the issues you are addressing?

WHY...

...is research useful or important for your organization?

... internally, to inform and assess needs in the community? YES NO

Explain: _____

... externally, to mobilize and educate community members around an issue?



[2. Designing Your Research Project](#)

Activities

[Developing Research Goals and Questions](#)

[Choosing Your Research Method](#)

[Developing Your Research Timeline](#)

Tools

[Guiding Questions for Developing Research Goals and Questions](#)

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[Participatory Action Research \(PAR\) Menu of Methods](#)

[Research Work Plan Template](#)

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Tool 2.1: Guiding Questions for Developing Research Goals and Questions

Issue the community is facing

What is the change you are trying to make?

WHAT...

...is the social or policy change you want to bring about at the end of the day?

...are your organizing goals, and how can this research be helpful achieving these goals?

...information do you need to better understand and document the issues you are addressing?

Informs research questions – what you are trying to find out



Tool 2.1: Guiding Questions for Developing Research Goals and Questions

WHY...

...is research useful or important for your organization?

... internally, to inform and assess needs in the community? YES NO

Explain

... externally, to mobilize and educate community members around an issue?

YES NO

...to support a specific policy campaign or influence policy and public debate around an issue?

YES NO

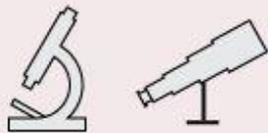
Can be both internally and externally important



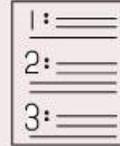
More on this in
Module 3!

Choosing Your Research Method

Developing
Research Goals
and Questions



Developing your
Research Plan
and Timeline



Putting together
an advisory
board

Tool 2.2: Guiding Questions for Choosing a Research Method

DOWNLOAD
TOOL 2.2

DESCARGA
HERRAMIENTA
2.2 EN
ESPAÑOL

Tool: 2.2 Guiding Questions for Choosing a Research Method

HOW...

... can you document or better understand the issue? Do you need “hard” numbers (quantitative data) or stories of personal experience (qualitative data)?

Quantitative Qualitative Both

... are you going to give legs to your research? What action strategies could you employ to make the research and report as effective as possible?

WHO...

... are the stakeholders in the issue? Who has interest, who is affected?

...needs their voice to be heard?

...are you trying to influence? Who has power over the issue?

...is your target audience (community members, elected officials, media)?

...will collect your data?

WHERE



2. Designing Your Research Project

Activities

[Developing Research Goals and Questions](#)

[Choosing Your Research Method](#)

[Developing Your Research Timeline](#)

Tools

[Guiding Questions for Developing Research Goals and Questions](#)

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Tool 2.2: Guiding Questions for Choosing a Research Method

Informs research methods

HOW...

... can you document or better understand the issue? Do you need "hard" numbers (quantitative data) or stories of personal experience (qualitative data)?

Quantitative Qualitative Both

Tie research back to organizing

... are you going to give legs to your research? What action strategies could you employ to make the research and report as effective as possible? _____



Tool 2.2: Guiding Questions for Choosing a Research Method

WHO...

... are the stakeholders in the issue? Who has interest, who is affected?

... needs their voice to be heard?

...are you trying to influence? Who has power over the issue?

...is your target audience (community members, elected officials, media)?

...will collect your data?

**Informs your
research sample
and research
designers**

**Informs your
release strategy**

Capacity



Tool 2.1: Guiding Questions for Developing Research Goals and Questions

WHERE...

... can you go to for information and other existing data?

Intake forms?
Existing research?

...can you go for support and assistance (non-profits, universities, government agencies)?

Technical assistance
providers? Allies?
Advisory Board?



Tool 2.2: Guiding Questions for Choosing a Research Method

WHEN...

... is the right time to do research? _____

...in your campaign?

...in the political context?

...in your organization?

Campaign needs evidence and documentation?

Timing the research with a legislative bill?

Programmatic changes?



Tool 2.3: Participatory Action Research (PAR)

Menu of Methods

Tool 2.3: Participatory Action Research (PAR) Menu of Methods

Surveys – Surveys ask specific questions and tend to include short answer, multiple-choice, and scaled-answer questions. Surveys can be done online, through the mail, and can be written and filled out in person. The most effective way to conduct surveys in support of organizing is in an in person “interview style” so that the surveyor can make personal connections with the respondent. Surveys are helpful for getting information or data from a wider group of people and are better for getting quantitative information like numbers, than they are for getting qualitative information, like people’s stories. Surveys can be helpful when making policy demands because elected officials, policymakers and the media tend to respond to hard numbers.

Interviews – Interviews are guided conversations about a specific topic, are often done one-on-one, and tend to use open-ended questions in order to get in-depth explanations. Interviews are useful when you want to get more specific, detailed information than you would get from a survey and you want to get deeper into people’s experiences and personal stories. Interviews are appropriate when dealing with sensitive or personal information that people may not be comfortable writing on a survey or sharing in a group setting (such as a focus group). Interviews can also assist the organizing outreach process because they facilitate one-to-one interaction, but they can be more time intensive than surveys.

Focus Groups – Are small group sessions (7-12 people) that are led by a facilitator in order to obtain opinions based on the research question. Like interviews, focus groups are good for getting qualitative data, and are an effective way to get people’s personal stories, testimonies, and experiences from a group setting. They can also be useful for delving deeper into a specific issue or research question not fully addressed by another method. Focus groups can be useful in allowing participants to bounce ideas and stories off of each other. Due to the group setting, they can also be more challenging than interviews for discussing sensitive topics.



Tool 2.3: Participatory Action Research (PAR) Menu of Methods

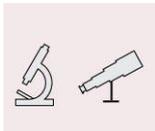
Mystery Shopping— Is a process where community members posing as customers call or visit businesses and document their experience and observations. Usually mystery shoppers have a specific set of criteria they are looking for when they visit or call a business. This is a good way to document employment practices, compliance with labor laws, and consumer fraud.

Secondary Data – Is data that comes from someone else’s research. This is distinct from “primary data” which is original data that you collect through your own research in the field. Secondary data is helpful for getting background information that will complement the ground-level information that comes from people’s experiences (primary data). It can also be helpful to do a bit of secondary data collection before you begin your primary data collection in order to focus your research questions and help you to develop your research instruments (such as surveys and interview guides). Secondary data can come from a variety of public and private sources, such as the U.S. Census Bureau, city and state agencies, research organizations and academic institutions.

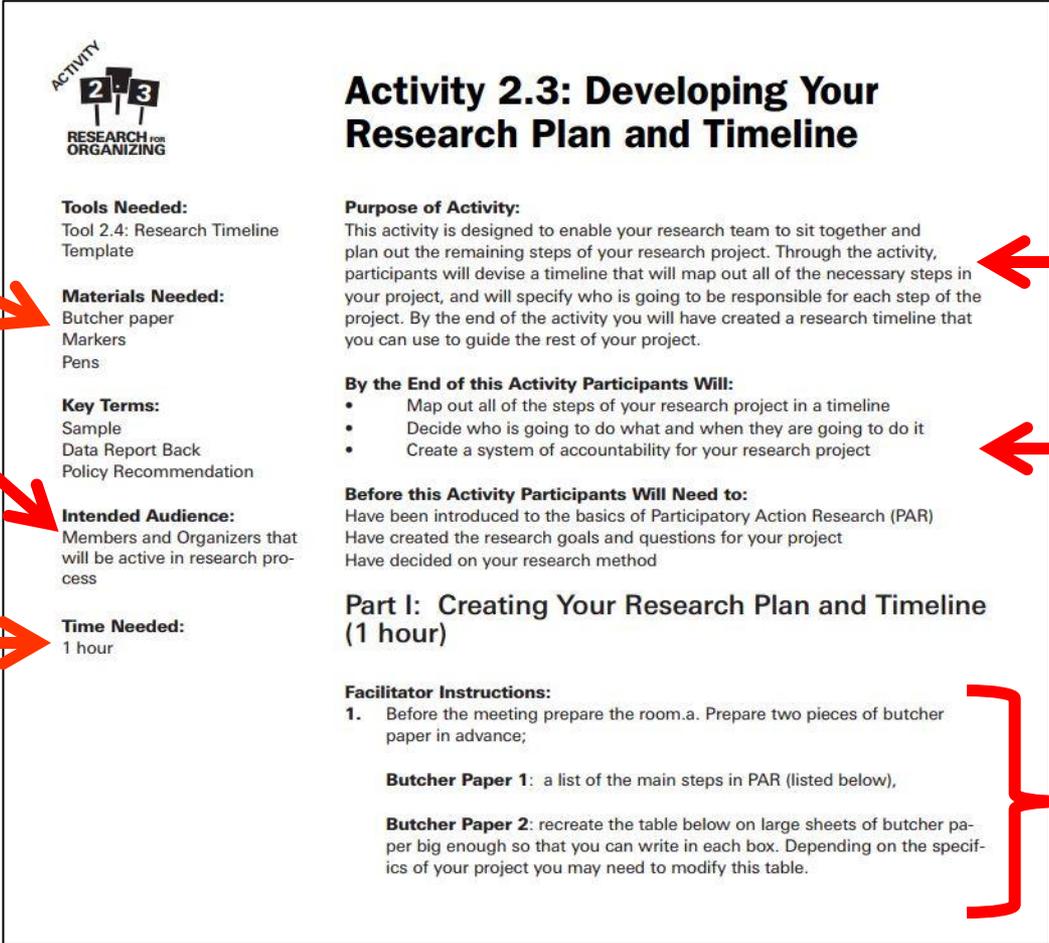
Media Review – A systematic review of a certain number of news articles or clips from a variety of sources about a specific topic to uncover the most common words or themes that emerge. This can be used as background research to help inform your research design and can also be used on its own to give you data about how a specific issue is being presented or framed in the media.

Literature Review – This is a review of existing articles, academic studies or reports in order to find out what information already exists about the topic you are exploring. This can be part of your secondary research; can help inform your research questions and can help you identify gaps in research and information on a given issue.





Activity 2.3 Developing your Research Plan and Timeline



ACTIVITY
2 3
RESEARCH FOR ORGANIZING

Tools Needed:
Tool 2.4: Research Timeline Template

Materials Needed:
Butcher paper
Markers
Pens

Key Terms:
Sample
Data Report Back
Policy Recommendation

Intended Audience:
Members and Organizers that will be active in research process

Time Needed:
1 hour

Activity 2.3: Developing Your Research Plan and Timeline

Purpose of Activity:
This activity is designed to enable your research team to sit together and plan out the remaining steps of your research project. Through the activity, participants will devise a timeline that will map out all of the necessary steps in your project, and will specify who is going to be responsible for each step of the project. By the end of the activity you will have created a research timeline that you can use to guide the rest of your project.

By the End of this Activity Participants Will:

- Map out all of the steps of your research project in a timeline
- Decide who is going to do what and when they are going to do it
- Create a system of accountability for your research project

Before this Activity Participants Will Need to:
Have been introduced to the basics of Participatory Action Research (PAR)
Have created the research goals and questions for your project
Have decided on your research method

Part I: Creating Your Research Plan and Timeline (1 hour)

Facilitator Instructions:

1. Before the meeting prepare the room.a. Prepare two pieces of butcher paper in advance;

Butcher Paper 1: a list of the main steps in PAR (listed below),

Butcher Paper 2: recreate the table below on large sheets of butcher paper big enough so that you can write in each box. Depending on the specifics of your project you may need to modify this table.

Materials

Intended participants

Time needed

Purpose of Activity

End goals for participants

Step-by step instructions



Tool 2.4: Research Work Plan Template

DOWNLOAD
TOOL 2.4 AS A
WORD DOC

DESCARGA
HERRAMIENTA
2.4 EN
ESPAÑOL

Tool: 2.4 Research Work Plan Template

Why is This Tool Useful?

This tool will help to document your research plan and methodology. It is also useful in developing a workplan, timeline and accountability mechanism for your project to make sure that each member of your research team is doing the work they have committed to doing and are keeping up with deadlines. This can also be helpful in putting together proposals for funding or other support because you will have all the information about your project in one place. Below is a template for a research plan. Sections can be shifted and deleted as needed.

Name of Organization(s):

Name of Research Project:

Date:

Background

This section should include some background information about the social issue that your research will address and/ or the campaign that your research will support.

Overview of project

This section should provide a brief overview of the research project including what issue you are addressing and why, what information you plan to collect, whom you are collecting the information from and how you are collecting information (See Tools 2.1 and 2.2).

Goals of project

This section should include a bulleted list of what you hope to achieve through doing this research project. Some examples include:



2. Designing Your Research Project

Activities

[Developing Research Goals and Questions](#)

[Choosing Your Research Method](#)

[Developing Your Research Timeline](#)

Tools

[Guiding Questions for Developing Research Goals and Questions](#)

[Guiding Questions for Choosing a Research Method](#)

[Participatory Action Research \(PAR\) Menu of Methods](#)

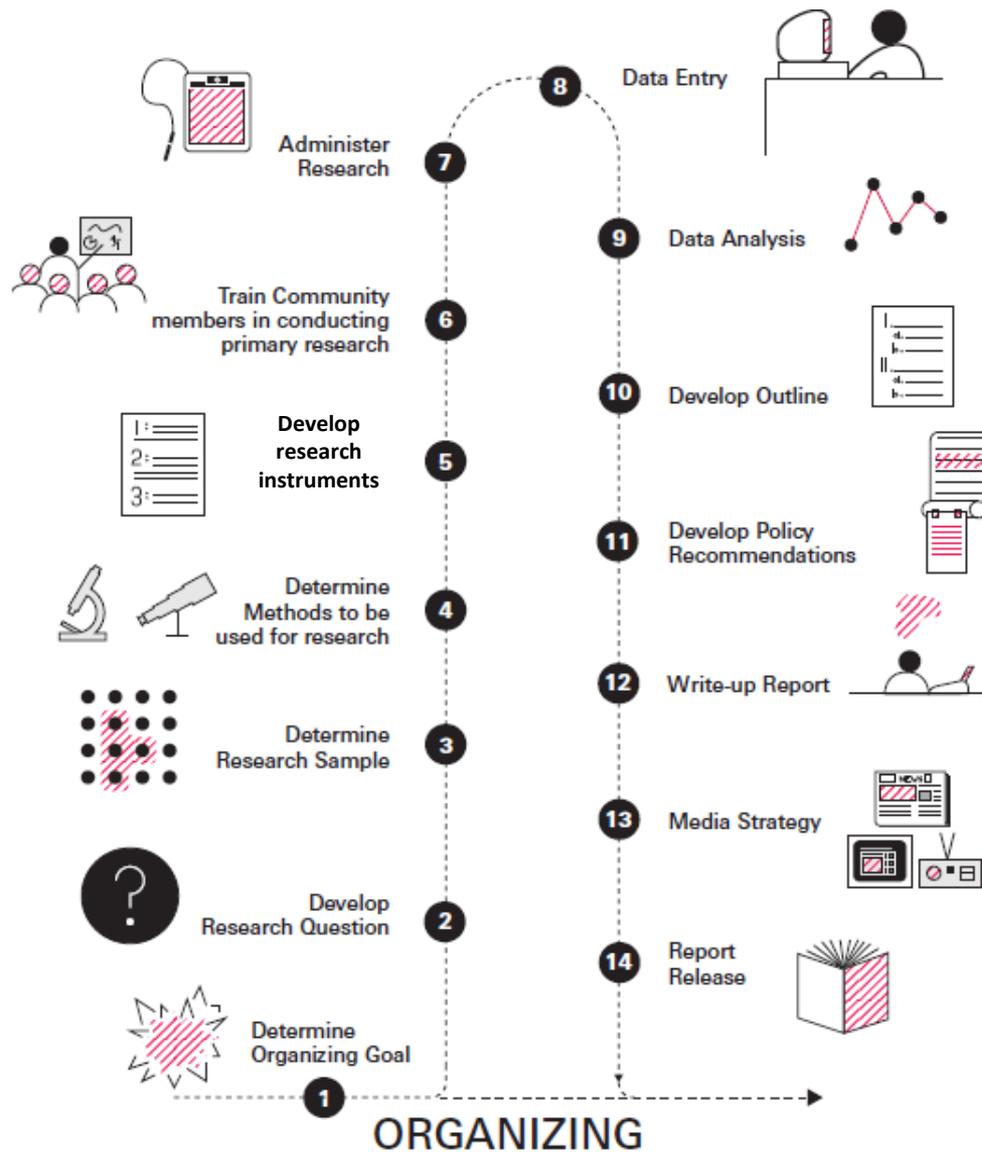
[Research Work Plan Template](#)

[Research Timeline Template](#)

[Advisory Board Invitation Template](#)

[TOP](#)





[Tool 1.3: Participatory Action Research Timeline](#)

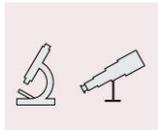
Tool 2.5: Research Timeline Template



Tool 2.5: Research Timeline Template

	What	When	Who
	What is the research task that needs to be done?	By when does it need to be complete?	Who will be the point person/ organization to make sure this task get done?
Develop Research Goals			
Develop Research Question(s)			
Choose Research Method(s) (i.e. survey, focus group, interviews, etc.)			
Create Research Plan			
Create Research Plan			
Design Research Instruments			
Select Your Sample			
Collect Your Data (based on research methods you chose)			
Enter Your Data			
Analyze Your Data			
Data Report Back			





Advisory Boards

- Are a group of people with knowledge or power regarding the issue
- Can be from other non-profits, members, academic institutions but make sure they are allies
- Give advice and feedback on research



Benefits of the Advisory Board

- Can solicit their advice at crucial points of the research project
 - Forming the research project
 - Drafting policy recommendations
 - Report release
- Best to form board as early as possible to get more buy-in to the project



Tool 2.6 : Advisory Board Invitation Template



Tool 2.6: Sample Advisory Board Invitation Template

Developing a Research Advisory Board can be a great way to bring together a team of resource allies to support and add capacity to your Participatory Action Research. Academics, lawyers or policy analysts that specialize in the issue you are researching are all good examples of potential advisors. We recommend bringing advisors together as a group early in the process and being clear about the role they will play and what they can expect from the process. Below is a sample letter you can send to invite advisors to an initial meeting. We also have a sample agenda for a Research Advisory Board meet (see Tool 2.7).

[INSERT YOUR ORGANIZATION'S LOGO OR PUT ON ORGANIZATIONAL LETTERHEAD]

[DATE]

Dear _____,

I hope you are well! I am writing to you to ask you to be a part of an exciting new research project of the [YOUR ORGANIZATION'S NAME] by serving on our advisory board.

As you may know... [INSERT BRIEF SUMMARY ABOUT YOUR ORGANIZATION'S OVERARCHING GOALS AND AIMS]

As part of this work, we are planning to conduct a participatory action research project focusing on [RESEARCH TOPIC].

Because of your familiarity with [ORGANIZATION NAME] and your expertise with these issues or strategies, I am reaching out to you in the hopes that you will serve on a Research Advisory Team to provide feedback on our research. As an advisor, I am requesting that you participate in one or more of the following:

- Read a draft of our report and provide feedback;
- Participate in one or more conference calls about the report;
- Provide feedback on policy recommendations;
- Provide advice on how to best use the report to advance [ORGANIZATION'S NAME]'s advocacy and organizing goals.

Please let me know by [INSERT DATE] if you are willing to participate on this Research Advisory Team. We will be scheduling for a meeting for [INSERT DATE]. Please don't hesitate to call (XXX) XXX-XXXX or email [INSERT EMAIL HERE] if you would like additional information or have further questions. We hope you will join us in this important work!

Thank you,

[INSERT NAME]

[INSERT POSITION]

Overview of research project

Involvement that you are requesting

Goals of your organization

Why they would be helpful to these efforts

Deadline to reply

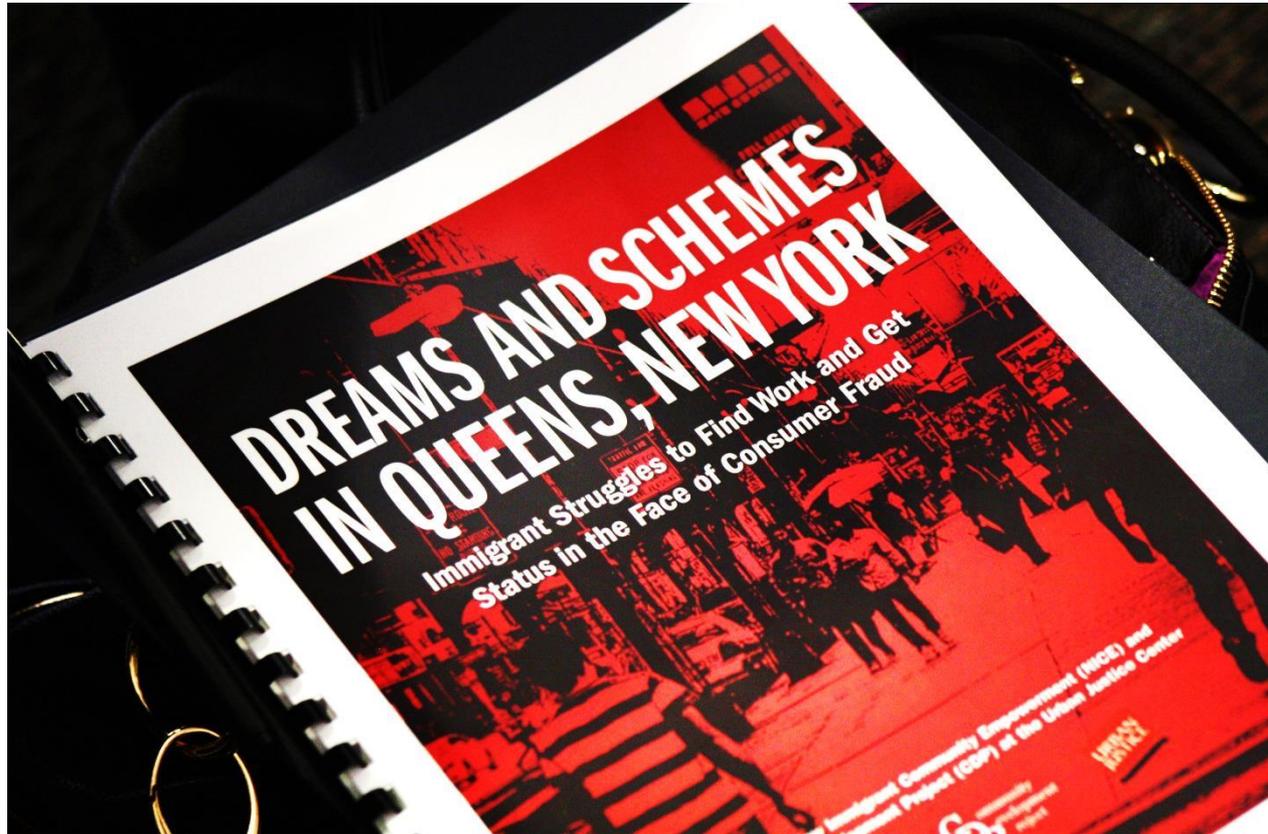


POP QUIZ!

What is the first step in designing a participatory action research project?



Case Study: Dreams & Schemes in Queens, NY



[Dreams and Schemes in Queens, NY](#)

Case Study: Dreams & Schemes in Queens, NY

DOWNLOAD
CASE STUDY
3.5

Case Study: 3.5 New Immigrant Community Empowerment's Report: Dreams and Schemes in Queens, New York

Background on Organization and Issue

New Immigrant Community Empowerment (NICE) is a community-based, non-profit organization that works to ensure that new immigrants can build social, political and economic power in their communities and beyond.

Every day, immigrants in New York City struggle to find work, support their families, and understand their immigration options. In this process, many seek assistance from a variety of services and businesses targeted at immigrant consumers. Aware of the vulnerability of new, primarily undocumented immigrants, many businesses, and individuals target and prey upon this community. Of note are the practices of Immigration Service Providers/Immigration Attorneys and Employment Agencies, services and institutions that defraud the community..

In recent years, members of NICE have consistently reported negative experiences with these providers, prompting NICE to investigate, analyze, and develop solutions. In order to gather evidence for NICE's campaign for better regulation and oversight of these predatory services, NICE and UJC developed a participatory action research project to document this problem.

Below is a description of the NICE Immigrant Consumer Fraud Research Project, based on the Participatory Action Research guiding framework (see Tools 2.1 and 2.2).

WHAT...



3. Getting Your Data: Mystery Shopping

Activities

[Mystery Shopping Training](#)

Tools

[Tips for Mystery Shopping](#)

[Sample Mystery Shopping Scenarios](#)

[Template for Mystery Shopping Form - Employment Agencies](#)

[Template for Mystery Shopping Form - Immigrant Services](#)

Case Studies

[New Immigrant Community Empowerment's Report: Dreams and Schemes in Queens, New York](#)

[TOP](#)

[Case Study: Dreams & Schemes in Queens, NY](#)

Case Study: Dreams & Schemes in Queens, NY

- New Immigrant Community Empowerment (NICE) is a community-based, non-profit organization that works to ensure that new immigrants can build social, political and economic power in their communities and beyond



Case Study: Dreams & Schemes in Queens, NY

- Newer immigrants have a hard time accessing services for everyday transactions such as money wiring, check cashing, job searches, immigration services, tax filing etc.
- Primarily undocumented immigrants vulnerable to unscrupulous, predatory, and fraudulent services and practices



Case Study: Dreams & Schemes in Queens, NY



A person distributing flyers and shouting announcements in Spanish



Signage in Spanish and words such as 'notario' make the Latin American public trust this place to provide legal advice



The two pictures above are examples of Multi-Service agencies that include ISPs



WHAT...

Were the Organizing Goals connected to this research?

- Document predatory, substandard and fraudulent practices of services in Jackson Heights, Elmhurst and Corona, Queens.
- Highlight gaps in enforcement & oversight of services targeted at new immigrants.
- Improve government enforcement & increase regulatory standards for these immigrant service providers and employment agencies



WHAT...

Overall questions did NICE want to answer through their research?

- How are lives and economic wellbeing of new immigrants impacted by predatory, substandard and fraudulent services?
- Why do new immigrants use these services?
- What are the current practices of Immigration service providers and employment agencies?
- What are enforcement and regulatory shortfalls for services targeted at this community?



HOW...

Did NICE gather information (what methods did they use)?

- **Mystery shopping-** NICE members posed as potential clients to gather information about the providers
- **Focus Groups:** explore experiences with fraudulent, substandard and predatory services
- **Secondary Data Analysis:** conduct research about the service providers identified through the canvass
- **Legal and Policy Research:** conduct research about various government bodies, laws and polices



Case Study: Dreams & Schemes in Queens, NY



WHY...

Was this research useful or important to NICE?

Internally

- Develop member leadership through direct participation in the research
- Strengthen Immigrant Consumer Justice campaign by gathering data and creating a report that supports the campaign goals

Externally

- Educate New York City and State government officials about the effect consumer fraud has on the community
- Get media attention towards the need for more regulation and laws governing these service providers

HOW...

Did research support NICE's organizing efforts?

- In 2012, NICE released the final report summarizing the research findings and policy recommendations.
- The release was attended by over 80 people community members, academics, the press, New York City Council member Daniel Dromm, and representatives from various city, state, and national government offices



Case Study: Dreams & Schemes in Queens, NY



INICIO
10/11/2012 06:43 p.m.
Algunas agencias de empleo e inmigración estafan a miles
Por: Luz Plasencia

DAILY NEWS
NEW YORK
Probe reveals rampant ripoffs hitting immigrants
Fraudulent businesses in rogue storefronts in Queens often fleece immigrants hunting for jobs or immigration help by taking fees for services they don't deliver, according to a report out Thursday.



THE QUEENS COURIER
BETA
<http://queenscourier.com/2012/non-profit-investigates-fraud-against-latin-american-immigrants/>
Non-profit investigates fraud against Latin American immigrants
Leave a comment



HOW...

Did research support NICE's organizing efforts?

- Formed the Justice 4 Jobseekers Campaign with organizations in New York to secure the passage of the Justice for Job Seekers Bill which would protect and empower workers
- The report is cited in the memo accompanying the bill



Research For Organizing Webinar Series

- [Module 1: Unpacking the Toolkit](#)
- Module 2: Designing your Research Project

Moving Forward

- **Module 3: Getting Your Data**
- Module 4: Creating, designing, and implementing Surveys – Quantitative Data



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- Module 5: Focus Groups & Interviews – Qualitative Data
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- Module 8: Presenting & Releasing your Research



What research method are you most excited to learn about in upcoming webinars?



Q&A

