

PARTICIPATORY ACTION RESEARCH

Theory and Methods
for Engaged Inquiry

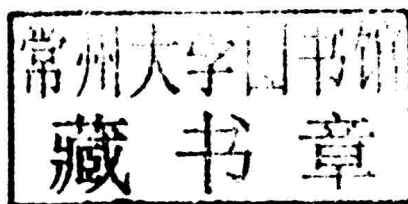
Jacques M. Chevalier
and Daniel J. Buckles



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engaged inquiry

*Jacques M. Chevalier and
Daniel J. Buckles*



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Participatory Action Research

This book addresses a critical issue in the natural and social sciences: the difficulty researchers, experts and students face when trying to contribute to meaningful change in complex settings characterized by uncertainty. More than ever, researchers and actors need flexible means and grounded theory to combine people-based and evidence-based inquiry into situations that do not lend themselves to straightforward explanations and technical solutions alone.

The authors build on insights from many disciplines and lessons from the history of participatory action research (PAR), French psychosociology and related work in community development, education, public engagement, natural resource management and problem solving in the workplace. All formulations of PAR have in common the idea that research must be done 'with' people and not 'on' or 'for' people. Inquiry of this kind makes sense of the world through efforts to transform it, as opposed to simply studying human behaviour and views about reality.

The book contributes many new tools and conceptual foundations to this long-standing tradition, grounded in case studies and real-life examples of collective fact-finding, analysis and decision-making from around the world. It is a state-of-the-art modular textbook on PAR methods, theory and practice, suitable for a wide range of undergraduate and postgraduate courses, as well as working professionals.

Jacques M. Chevalier is Chancellor's Professor Emeritus in the Department of Sociology and Anthropology at Carleton University, Ottawa, Canada.

Daniel J. Buckles is Adjunct Research Professor in the Department of Sociology and Anthropology at Carleton University, Ottawa, Canada, and an independent consultant.

This book is a must for anyone seriously committed to research that ensures the authentic participation and empowerment of people from all walks of life, be they from oral or textual traditions, women or men, old or young, articulate or hesitant, outspoken or reserved.

*Farida Akhter, Executive Director, UBINIG
(Policy Research for Development Alternative), Dhaka, Bangladesh*

This exciting and innovative book shows the patterns and processes that connect people and their social, practical and conceptual worlds in action. Its key themes of interdependence, relationship and the need for dialogue make it a book today for tomorrow's world. It should be on all reading lists as a key resource for developing socially-oriented pedagogies for a more peaceful, productive and interconnected world.

*Jean McNiff, Professor of Educational Research at York St John
University, York, UK and author of Action Research: Principles and Practice,
now in its third edition (Routledge, 2013)*

... a wonderful compendium, replete with practical tools and techniques that bring rigour and vigour to the international dialogue among action researchers ... This is a serious volume worth the time of any action researcher who is curious about how western (including francophone) perspectives on PAR come alive. This volume makes a significant contribution to the collective craft of scholarly-practice among action researchers.

*Hilary Bradbury-Huang, Professor in the Division of Management
at Oregon Health & Science University, Portland, USA and Editor of
the journal Action Research*

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Preface

This book has been ten years in the making, and marked by a world of adventures. Thanks to a series of grants from Canada's International Development Research Centre (IDRC), people on five continents contributed in various ways and at various times to developing a novel approach to participatory action research (PAR), using the project title SAS² (for Social Analysis Systems²) as a temporary label. Community members, professionals in many fields, university students and faculty, working with the authors and on their own, engaged in hundreds of short- and longer-term inquiries into a wide range of topics meaningful to the people involved. These were combined with more than 100 capacity-building workshops involving some 2,080 people in twenty-two countries, facilitated by the authors and our many partners. At the heart of these research and training events was a process of constant dialogue and critical reasoning aimed at bringing about social change in community life, the workplace and civil society.

In Honduras, Juan Amilcar Colindres, Wilmer Reyes Sandoval and Ana Mireya Suazo led a core group of faculty and students at the Universidad Nacional de Agronomía (UNA) applying the proposed methods to research on the social dimensions of natural resource management. Dozens of thesis projects emerged from their training and research activities, leading as well to curriculum changes in two university degree programmes approved by the National Board of Higher Education. Laura Suazo and Raul Zelaya of IDRC played a key role in developing relationships with other national actors in Honduras, including the Regional University of the North (CURLA), a network of non-governmental organizations (NGOs) known as REMBLAH, an inter-institutional research project in the Rio San Juan area on the border with Nicaragua, the Universidad Agrícola Panamericana (Zamorano) and La Universidad Pedagógica, among others (see *ART* in Chapter 3, *Validation* in Chapter 8 and *Social Analysis CLIP* in Chapter 12). Laura Suazo, in a review of the Central American experience with PAR, argued that what had been missing, and now resonated with people working with this new approach, was the possibility of rigour combined with participation and a pragmatic focus to research. Earlier work by the authors with members of the Latin American Conflict and Collaboration Program (coordinated by Rolain Borel at the University for Peace in Costa Rica) had reached similar conclusions.

The Bolivian Centre for Interdisciplinary Studies (CEBEM), a prominent convener on development issues in the Andean Region led by José Blanes, stimulated small-and larger-

scale inquiries in various countries through numerous collaborative training events, including a distance learning course. These were sponsored by regional universities, the Swiss Foundation for Technical Cooperation, the Ibero-American Model Forests Network, the Church-based Machaqá Amawt'a Foundation and Cuso International, among others (see *Activity Dynamics*, Chapter 17). Six case studies were later published by Edgar Pabón Balderas and many others appeared as unpublished theses and reports. The most comprehensive study was a doctoral dissertation by Jorge Téllez Carrasco on community forestry in Bolivia, work that eventually won a prestigious prize from Universidades de la Comunidad de Madrid (Spain) for excellence in research on international development in the field of engineering (see Chapter 13). David Mercado, based in Cochabamba, Bolivia was particularly prolific and creative in his use of a wide range of tools presented in this book, especially with indigenous peoples and municipal governments (see *Social Dynamics*, Chapter 17).

Our work in Bolivia contributed as well to the development of a methodology to engage municipal governments in planning local economic development initiatives. The initiative, launched by the Atlantic Community Economic Development Institute (ACEDI), the Federación de Asociaciones Municipales de Bolivia (FAM) and the Government of Bolivia, was a response to persistent gaps in the capacity of municipalities to design and implement local economic development policies and programmes, as required under the Bolivian Law of Participation. Under the direction of Juan Téllez (ACEDI), the research team leading this project developed and tested a quantitative economic evaluation methodology in a number of municipalities, using a process-oriented approach to engagement with municipal governments informed by the SAS² project approach.

In Chile, our work with Carlos Tapia brought the methods to numerous university settings and research projects including the Universidad de la Frontera, the Universidad de Chile and the Instituto de Fomento Pesquero (see *Option Domain*, Chapter 18). Jenny Menacho in Peru facilitated workshops for the Municipality of Lima (with Maria Fernández) and the Pontifical Catholic University of Peru. Most of these events were organized around multi-stakeholder groups with concrete projects in common. This grounded workshop practice contributed to new thinking about the problems at hand (on our approach to capacity building and higher education, see the *Conclusion*).

Most activities developed in Latin America involved formal research and higher education institutions. In Asia, grassroots organizations took the lead. In eastern India the authors worked closely with the Academy of Development Sciences (ADS) on a single, long-term study with the Katkari, a 'Particularly Vulnerable Tribal Group' fighting eviction from more than 200 hamlets near Mumbai, India. Eventually, the initiative helped the Katkari secure title to a large number of village sites (more than 60) and significantly enhanced the level of organization, leadership and self-confidence of the Katkari community. It also resulted in a major book by Daniel J. Buckles and Rajeev Khedkar, published in 2013 by Cambridge University Press India and used to illustrate various tools and themes in this book (see Chapters 4, 7, 9 and 12).

In addition to research with the Katkari, Rajeev Khedkar developed his own approach to training more than 40 grassroots organizations from eleven different states in India

in the use of tools they found most useful for exploring problems and developing solutions with non-literate community groups. The German Catholic Church aid agency MISEROR and the Luxembourg-based organization Action Solidarité Tiers Monde (ASTM) funded much of this work. Khedkar also created a Marathi collection of tools to support the training, and worked closely with the Development Research Communication and Services Centre (DRCSC) located in Kolkata in eastern India. DRCSC made a similar collection of tools in Bengali and coordinated a series of training events with small, community-based organizations in Orissa and West Bengal (see *Disagreements and Misunderstandings* and *Levels of Support* in Chapter 14).

In Bangladesh, the authors worked with UBINIG (a Bengali acronym for Research for Policy Alternatives). This activist organization, led by Farhad Mahzar and Farida Akhter, works with a farmers' movement (the Nayakrishi Andolon) numbering more than 300,000 households. Many of the simple and advanced tools presented in this book provided a platform for engaging these farmers in detailed discussions of their livelihoods (see *Social Domain* in Chapter 18 and the detailed story of *Breaking the dependency on tobacco production*, Chapter 19). UBINIG later made use of this experience to design its own action-learning course for work with weavers, fishers, farmers and managers of small enterprises. They also developed a process for engaging professional journalists in a collaborative inquiry with farmers as a way to deepen journalistic assessments of key debates and issues in agriculture.

LIBIRD (Local Initiatives for Biodiversity Research and Development), based in Pokhara, Nepal was another key collaborator in Asia. LIBIRD is a well-established research NGO with a strong reputation and track record in the formal research system in Nepal. As in Latin America, the rigour and pragmatic focus of the concepts and tools presented in this book appealed to the organization's roots in plant breeding and other technical fields. Initially coordinated by Diwakar Poudel and later by Bimal Regmi and Bikash Paudyal, LIBIRD and its partners facilitated numerous training events. These led to dozens of case studies on gender-based crop preferences, the problems of livestock herders, disaster prevention in hillside environments and the challenges of wetland management. Neeraj Chapagain of the Livelihood Forestry Program in Nepal also took the concepts and tools to various parts of Nepal, and undertook research with a focus on relations of trust among groups involved in social forestry (see *Network Dynamics*, Chapter 17).

In Canada, innovative research and methodological training was grounded in other sectors and different institutional arrangements. The key partners were consulting firms, researchers in education and Canadian organizations working in international development. Canada World Youth (CWY), an NGO focussed on creating international educational opportunities for young people, was instrumental in bringing our approach to PAR to bear on evaluation questions as a distinct instance of action research. Together with Kate McLaren and Paul Turcot (at South House Exchange), the authors designed and implemented a five-country study of the impacts of youth exchange programmes on present and past participants and on host communities (see Chapter 7). Other evaluation designs and problem-solving applications inspired by this work followed in contexts as diverse as The United Way of Canada (an umbrella organization in the social service sector), Bhutan's Ministry of Education (Chapter 7) and YouthScape, a youth and

environmental education programme funded by The McConnell Family Foundation and coordinated by the International Institute for Child Rights and Development (see Chapter 14).

Recently, we began working with ten Canadian international NGOs towards the development of new approaches to combining results-based management methodologies widely used by donor and government agencies with participatory approaches to planning, monitoring and evaluating projects and programme results (see *Rethinking evaluation methods in organizations*, Chapter 3). This initiative has also contributed to innovation in the field of evaluation by testing a new tool based on Anglo-Saxon legal reasoning and judgment entitled *Attribution and Contribution* (see Chapter 16). Work with other emerging communities of practice, coordinated by the Association québécoise des organismes de coopération internationale (AQOCI) and Crossroads International, focussed on problem assessment, priority setting and programme evaluation as applied to gender equity initiatives in the field of development.

Collaboration with partners in Canada led to applications of innovative PAR methods to the workplace and public engagement in problem solving, strategic planning and programme evaluation. Benoît Hurltel of the consulting firm Efficiencie International partnered with the authors to work with a number of major public sector agencies in Canada. Faculty and students at the Trent Centre for Community-Based Education, under the leadership of Todd Barr, and the University of Manitoba's Department of City Planning, also provided contexts for experimenting with workplace and public engagement processes. Other inquiries were carried out jointly with researchers and community groups such as the Cree Outfitters and Trappers Association (see *Idea Scenario* in Chapter 14), the Keewaytinook Okimakanak Research Institute (see *Competing principles of government consultation with natives in Canada*, Chapter 14), Carleton University (Chapter 10), the Bonnechere River Project (Chapter 9) and Canada's National Capital Commission (see Chapters 5 and 7 and Figure 16.1 in Chapter 16).

Francophone Canadian researchers in education emerged as a vital link to academics in Canada and source of new ideas and approaches to engaged inquiry. They also developed a robust community of practice in education, the Collectif des Savoirs Apprenants, a group working with teachers and school administrators in Quebec, Ontario and Belgium on a wide range of issues. This story is currently in the process of being turned into a book, under the leadership of Michelle Bourassa (Université du Québec en Outaouais).

Improvements to our teaching resources came from an unanticipated Canadian source – the Cree Outfitters and Tourism Association (COTA), an indigenous organization based in Northern Quebec. A workshop to build the capacities of COTA members was so successful the Association decided to commission a toolkit for First Nations community-based tourism development officers. After several rounds of testing, participants settled on tools they felt would be most useful in their work. These were then compiled with the help of Debra Huron and Zélie Larose into a set presented in a style based on principles of clear language and clear design. The learning from this process eventually resulted in a much larger collection of tools for use in workshops and training events, published by the authors in English, French and Spanish as *The Social Weaver: A Handbook for*

Participatory Action Research, Planning, and Evaluation (see www.participatoryactionresearch.net).

Designing flexible inquiries for a particular sector proved to be an effective way to combine innovative PAR with other methods used in specific disciplines and fields of study. This concept was further developed for the aboriginal tourism sector with Sylvie Blangy of the Université de Montpellier, France and UNEP's Secretariat of the Convention on Biological Diversity (see *Resource Mapping*, Chapter 9). Other designs for facilitating multi-stakeholder dialogue in specific sectors were created for work on accident prevention in the French construction industry, in close collaboration with Patrick Obertelli at the École Centrale de Paris (Chapter 10); on disaster relief efforts in the Philippines and Peru, in response to an invitation from the disaster relief network of the Ministers of the Infirm (Order of St. Camillus de Lellis) (Chapter 15); and on climate change adaptation in Nigeria, work undertaken with Ricardo Ramirez, Maria Fernández and John van Mossel (see Chapters 9 and 11). Designing an inquiry process to elicit community perspectives on key factors and concepts central to agriculture was also the focus for several other workshops held in Africa – in Senegal, with the Coalition pour la Protection du Patrimoine Génétique Africain (COPAGEN) and USC Canada (see *Ecological Domain*, Chapter 18) and also in Morocco, with the Institut National de la Recherche Agronomique (CIRAD) and the Centre de Recherche en Économie Appliquée pour le Développement.

A website (www.participatoryactionresearch.net) ensures ongoing public access to the results of this extensive collaborative initiative and the many tools and methods developed along the way.

To all of our partners, the people they work with and the many pioneers of PAR, we extend our heartfelt thanks.

Jacques M. Chevalier and
Daniel J. Buckles

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