

ACTIVIST TRAINING MANUAL: DESK RESEARCH

The aims of this chapter

This chapter of the manual will provide advice and information to help you research your issue to gather information and evidence needed to create an effective campaign.

Gathering film and photographic evidence is covered in detail in the video and camera training chapters. Other chapters which may be useful to you are those on Advocacy and Communications.

This chapter is divided into three key sections:

Section 1. Defining your research needs

- 1.1 Introduction – the essential basics
- 1.2 Identifying the information you need for your campaign
- 1.3 Identifying your audience
- 1.4 Identifying how you want to use your information

Section 2. Conducting research

- 2.1 The internet
- 2.2 Newspapers and magazines
- 2.3 Video news and documentaries
- 2.4 Developing contacts

Section 3. Presenting your information

☛ Please note that this chapter does not seek to provide an exhaustive list of resources, or a proscriptive methodology for research. This chapter will provide you with suggestions, ideas and tried and tested practices. It highlights many of the common mistakes made and identifies ways and means to ensure your research provides you with the type of information needed to build an effective campaign for change.

SECTION 1. DEFINING YOUR RESEARCH NEEDS

1.1 Introduction – the essential basics

Before embarking on any programme of research there are a number of questions which first need to be answered. These will help you identify what you need to find out and where to look:

- Why do you want to undertake this research and what do you want to do with the information you gather - what is your objective?
- Is this research part of an existing campaign strategy – where does it fit in?
- Have you identified who you want to reach with your information and how?
- What time, money and resources do you have to achieve your research goals?
- Always take time to plan your research, carefully consider and write down your strategy for research.

The Golden Rule – ensuring factual accuracy

- You **MUST** ensure factual accuracy in any statements that are made, and when there is doubt, if information is anecdotal or unsubstantiated, this must be clearly identified when you write up your research. Statements of fact must be provable fact, supported by credible references or proof (e.g. such as filmed evidence).
- It is essential that all the information you collate is effectively referenced, preferably by at least one independent source.

1.2. Identifying the information you need for your campaign

Working through the following steps will help you on the next stage of structuring your research.

How much information do you already have?

Always start your research by examining your existing files and sources of information to establish what information or leads you may already have as this can save you time and money. Carry out some initial research into the work that others may have done on your issue – what has been said or published in the past? What succeeded or failed? How can you follow-up on earlier work that your own or other organisations have done.

Crucially, if it is an NGO report or other document, try and find out how it was received by government, companies, the media and the public. Was it successful in achieving the objective? If not, why not? Spend time thinking how you would have approached the issue.

This initial phase will provide you with a clearer idea of other people involved with the issue – whether they are community groups, other NGOs in your country or overseas, journalists, scientists or government officials.

Researching your opposition

Also be aware that it is important to identify and understand the information which stands in opposition to your stated objectives (e.g. those opposing securing fishing rights for local people and sustainable fishing practices). You will need to be able to answer and effectively challenge the viewpoint, opinions and stated facts of those who disagree with you.

Information gaps

A lack of information is not always a problem or a weakness in your position. Consider why there is no evidence – for example, if a government has chosen not to undertake an environmental impact assessment for a project or if export figures or details about a company is deliberately being withheld from the public, then say so. Similarly, a refusal to provide information can say a great deal about a government, organisation or company's attitude to a problem.

• The value of good contacts cannot be overestimated – networking with others working on your issue – or related issues – is extremely valuable whether it is for information gathering or for enlisting support for your campaign.

Collecting new information – what do you want to verify or prove?

It is helpful to pose yourself the following simple questions and work through them in your research.

What is the problem and what are the various impacts?

For example, what are the effects of the unsustainable fishing practices on people, wildlife and the wider environment?

Who or what is causing the problem and why?

It is important to identify the root causes of the problem and the people or factors which created it and continue to drive it on. For example, local people may be illegally logging in important protected area forests, but they may only be doing this as other means of income have been denied to them, or they are being encouraged to do this by outside companies.

Go through your available materials and try and critically appraise them – what are the gaps, inconsistencies in facts, figures or arguments presented? Are the arguments justified on the basis of the available information?

What are the solutions and alternatives?

If your research is being undertaken as part of a wider campaign to achieve beneficial change it is vital that you try and identify effective solutions which can be presented as an alternative to the problem. These solutions need to be based on practical and achievable propositions – there is no point suggesting changes, which simply cannot be implemented, for example because of excessive cost.

Activities which you may be helpful in your research

Will you be able to do field research or investigations as well as desk research? Field investigations will enable you to gather first-hand, personal knowledge and proof of claims or statements made in written reports, on the internet etc. It can prove invaluable in providing concrete evidence, particularly if you are able to gather visual evidence.

Look out for compelling visual images

Film and photographs are part of a truly international language, transcending national, cultural and linguistic boundaries. Visual images can be used to bring issues to life, making it interesting and intelligible to a wide diversity of people. Visual images can and do change the world, they can convey quickly and immediately the nature and impact of a problem.

Think about what images may already exist and consider whether you could collect new images yourself.

☛ See the Activist Training Manual chapters on Film and Photography.

1.3. Identifying your audience

It is very important to keep in mind who you are trying to reach – who you need to see and understand your research in order to achieve your research or campaign goals. This will in part determine the nature of your research and definitely influence the ways in which you present the information you uncover. For example, presenting detailed and in-depth scientific analysis is unlikely to be an appropriate way to try and reach local communities and engage their interest or support.

Until you have achieved some progress with your research, or even finished it, it is probable that you will not be able to single out particular audiences you want to reach.

Broadly, there are a number of key audiences you may want to reach, which by virtue of their power or influence may help you achieve your goals (these are not listed in any priority):

- Policy makers and governments (local or national)
- The scientific community

- Local communities
- International community and agencies (such as the United Nations Agencies, World Bank etc.)
- International legal agreements (such as the Convention on International Trade in Endangered Species)
- Businesses and corporate organisations
- Consumers or investors
- Other non-government organisations, community groups or recognised experts
- A mass public audience (locally, nationally or even internationally)
- The media – is perhaps the most efficient and effective means to reach some or all of these audiences. If you structure a media campaign effectively you can reach local, national and international audiences

Supporters and the opposition

- Identify who has vested interests in the issue you are addressing – which companies, investors or individuals may support or oppose you.
- Have government, business or international agencies published any statements, reports or information on your subject. Check their literature, visit their websites, examine the facts, figures and quotes they provide.
- Is the opposition supported by government policy and acting within the law or are they acting illegally or corruptly? Were laws or policies changed to enable a project or activity to go-ahead? Establish the legal framework governing your issue – this can provide the basis for your arguments for change.
- Find out what support your opposition has – are they part of a multinational company which sells the products overseas? Does it have support from financial institutions (e.g. private investment houses); from governmental bodies (e.g. Export Credit Guarantee Agencies); or from international bodies (e.g. the International Finance Corporation, part of the World Bank Group)?
- Finally, do you know what the public thinks of the 'opposition'? It may be that opinions are divided – a company causing environmental damage may be unpopular with people who are affected by the pollution it causes whilst others are supportive of it because it creates employment. Can you dispel a myth that a company or development is bringing prosperity or long-term development? If the natural resources are destroyed what will happen to local people?

Plan a research strategy and think creatively

Once you have gone through the stages and answered the questions highlighted above you should be able to devise a clear and focused research strategy with scheduled activities.

This could include:

- office-based research collating existing material relevant to your campaign – published information, visuals and internet sources and contacting people from a

variety of fields. Office-based research should complement and provide the necessary background information for field-based investigations, establishing contacts and support.

- field research to gather information and visual evidence first-hand and verify facts and claims. _interviews with local or international experts and the people who are directly impacted by environmental problems.

1.4. Identifying how you want to use your information

The findings of your research will have significant bearing on how you finally decide to use the information you uncover.

The format in which your research is presented will be integral to its impact. There are many different tools you can use to do this and all of these should at least be considered. The different options available to you **MUST** be viewed in the context of who you are trying to reach. For example, if you are trying to reach and influence local communities, it is unlikely that a very dense, complicated and highly scientific report will engage their interest or support.

The following represents some tried and tested ways of presenting and disseminating research information:

Reports and briefing documents

Visual illustrations (including photographs, graphs or tables) lend impact to your report and make it easier to read and understand the main points of your argument. Alternatively, a briefing document can simply highlight your key facts, findings and recommendations.

Press releases

A press release can be the most efficient and effective way of disseminating your research. A press release is often useful as a means to publicise the fact that you have produced a report, briefing or other document. If your research has included the collation of new or existing video/film documentation it is possible to edit this material and release it as part of your press release. A visual representation of a written report and can be highly impactful.

Educational videos

This can be an extremely effective way of communicating to specific audiences, particularly among local communities.

Direct presentation via seminar or conference

Are there international or national meetings or workshops that the research can be presented at. Find out what other organisations are planning.

Digital

The using your social media and website can be a very effective, wide reaching way of publishing your work. When considering any of the above cost, time and potential benefits must be carefully thought through before making any decision.

TIP: Try to think creatively – is there a new way in which you can present your issue to achieve change?

☛ **REMEMBER** All your information must be factually accurate and robust – you must be able to substantiate your statements. The credibility of your research, your organisation and supporters depends on this.

SECTION 2. CONDUCTING RESEARCH

2.1 The Internet

The internet has a great advantage of immediacy and can provide you with recent research, expert opinion and contacts as well as scientific, NGO, government and business statistics, data and opinions. Published reports are almost always available to print as soon as they are published online.

Email

Email is incredibly useful for research. Many large companies, NGOs, agencies etc. have simple email addresses so if you have the name of your contact it is easy to get in touch, for example, all staff at the World Bank have the email address: 'initialsurname@worldbank.org'. When using and storing email addresses remember to keep within the bounds of all relevant data and privacy laws, such as [GDPR](#).

☛ **REMEMBER** Just because information is published on the web does NOT mean it is correct. If it comes from a credible recognised body, such as one of the United Nations organisations it will probably be accurate and up to date, but other, unknown sites cannot always be trusted – always double check and try to verify information.

Example Be a 'dummy'

Email has an added advantage in that researchers can maintain a degree of anonymity and thereby establish information that might not otherwise be available, for example by purporting to be a trader in endangered wildlife. 'Dummy companies' (that don't really exist) have been an essential tool for investigators researching issues such as the illegal

trade in ozone depleting chemicals. You can set up an email account using a different name and set up a dummy website to endorse your credentials.

Searching effectively

You can be very specific in what you search for (an exact phrase over a specific period of time) or spread your search wider. But remember this will produce many more results and can be very time-consuming to sift through to find what you want.

The results produced by any search engine should provide enough information for you to judge whether the pages listed will be useful or not. Bear in mind that many results will bear no relationship to the information or issue that you are searching for so think about what information you really want.

Generally, the more exact you can be on what you want included and excluded from your search will help. Enclosing a phrase in quotation marks is like saying 'exact phrase only' and narrows things down to a manageable number.

Returning to a site and finding new ones

When you find a useful website, search engine or directory that you'll want to return to in the future, remember to 'bookmark' it – add it to your list of favourite sites. Use links pages to related organisations, to find new information, ideas and resources – you will certainly find new items that you wouldn't have necessarily found in your search.

Mailing lists and newsgroups

Mailing lists can be incredibly helpful tools to the researcher, providing updated information on a range of environmental, developmental or human rights issues amongst others. They can include both news items taken from local or international media and press releases, alerts or news placed directly with them by NGOs or others.

- Mailing lists automatically keep you updated with news. Bear in mind that joining some lists can result in you receiving many email messages, most of which will not be helpful to your work, especially if you are interested in a very specific topic. In this case it is probably easier to carry out a search for information.
- Newsgroups (or discussion lists) can be useful for contacts, ideas and specialist information. Anyone can contribute information or opinions on an issue – your contribution will be distributed to all other subscribers. They can be useful for contacts and alternative opinions but bear in mind that open lists can also include lengthy dialogues between individuals that will not be of any interest to you.

2.2 Newspapers and magazines

Can you access an archive of stories on or related to your issue? Are they behind a paywall on the internet? If so you may be able to get a limited free subscription that enables you to access a small number of articles a month.

Magazines may be useful for:

- feature articles – including interviews with people involved or affected by the problem
- information such as statistics, GDP, imports/exports of a commodity, trends in sales etc.

Specialist trade or issue-specific magazines may be difficult to access (largely because of the expense) but can be useful for specific details on a company, product etc.

2.3 Video news and documentaries

A number of journalists have produced television features on environmental and social issues that have spurred campaigns forward and highlighted an issue to a new audience. For example, CNN provided a huge boost to the fight against the illegal bushmeat trade in West Africa by working with investigators to compile video evidence of the problem. Coverage on CNN reached every continent and helped spur governments in Africa and beyond to begin to address the problem.

2.4 Developing

contacts Journalists

Whether they work for newspapers or television, in your country or overseas, journalists can be an excellent source of factual information as well as providing suggestions for other contacts or for companies, places or people to investigate or those to avoid. As well as being essential in helping you get your message out to your audience, having close contacts with reputable journalists can also make life as a researcher far easier.

Get to know them, make friends.

Company workers

Whether they work at a head office in your country or overseas or are employed 'in the field' company employees can be a source of extremely useful information as they are in effect working on the issue on a daily basis. They are also 'insiders' having access to information that would otherwise be difficult to access. They may be able to corroborate information or facts, such as where products are being exported to and how much is produced, who owns the company (and of course whether there are links to government or public officials) and where else it operates.

Government officials

Government sources can provide useful information for your campaign. Even a lack of information on your issue can be useful and back up calls for more research or for a 'precautionary approach' (i.e. if you don't know what will happen as the result of an action, then avoid it).

Government employees are also immersed in issues on a daily basis and they frequently have access to information that is not widely available, for example, contracts with companies. Because of their position government staff may be necessarily cautious in their dealing with NGOs and reluctant to share information. Others may see that their own work is being undermined by business interests and happy to share information that they themselves cannot act upon. But exercise caution – always respect requests for anonymity for your sources in order to protect them and take time to build mutual trust. If in doubt always check with your source first to see if they are happy to be named.

Other NGOs

Liaise with colleagues working on your issue or related issues. Some of the information that you are seeking may have been collated, analysed and published by others. NGOs – particularly those working on research or field projects – can be an excellent source of information. But beware, however good the information is, governments, industry and others can demolish campaigns by accusing NGOs of bias and poor research. If you can, corroborate information yourself or get an independent source to do so.

TIP: By contacting NGOs and others during your research, you will be able to find groups and individuals and build a network of support for your cause (see the Advocacy Chapter of the Activist Training Manual).

International organisations and agencies

Staff from the international funding and aid agencies (such as the World Bank, USAID, etc.) often have privileged access to information as a result of the relationship with governments and ministries. They are also in a position to exert pressure on governments to implement change and will often conduct their own research and analysis of a problem. For example, the DfID office in Jakarta has highlighted the problem of illegal logging in Indonesia whilst the World Bank and IMF have supported moves to halt illegal logging and timber smuggling in Cambodia.

Whether or not the information is made publicly available, gaining a comment or insight from agency staff – either in support or opposition to your stance – can be very useful.

Independent expertise

Academic experts in science, economics, health and so forth have the advantage of giving your research credibility. NGOs, governments and agencies may also employ specialists who can help you. However, they may have strong opinions that can undermine an independent viewpoint.

Original research, data and statistical evidence are all extremely useful for incorporating into reports etc. Journals and published papers can provide an indication of the research institutions and individuals who can help you both with this information and with comment and opinion.

Quotes

As well as supplying data, there are plenty of authoritative sources who can supply you with quotes and check for any existing commitments made by governments, companies or agencies in support of or opposing your issue – in your country or region or elsewhere.

Remember this doesn't need to be your government, it could be for example, a World Bank pledge to stop funding destructive projects or a company announcing that it will not sell dangerous pesticides or log an area of forest. It may be that you want to prove these claims are untrue or conversely, you may be able to use them to your advantage by citing them as examples of good practice for others to follow.

For example, if some companies have stopped a damaging practice, find out why and if appropriate make them your allies and get quotes in support of what you are trying to achieve. Companies that are seeking to use good practices may be resentful of cost-cutting and damaging practices of their rivals and willing to support your work.

Try to gain new quotes from people who are mentioned in past reports etc. Ask them why they think the problem is getting worse and what they think needs to be done.

Remember that you can always check to see if someone has changed their opinion or if an organisation has altered its activities or policies over time – and why.

SECTION 3. PRESENTING YOUR INFORMATION

Further details on the ways in which you can present your information is provided in the Advocacy and Communications Chapters of the Activist Training Manual but we will make further brief mention of some key points here as the final step in your research.

Always bear in mind that regardless of how good your research is, if it is poorly presented or presented to the wrong audience it can become worthless.

If you are writing a report, briefing, press release or other publication (including writing a script or voice-over for an educational video) try to be as clear and succinct as possible.

Ensure that the information backs up your claims and supports the actions you are calling for.

Have confidence in what you say and write, and back this up with as much evidence as possible – references to published reports and articles; personal testimonies; videos, photos and other visual evidence. As always, thorough preparation and planning are your most valuable tool.

References

Always keep a file of all the references you use in your research so that you can verify the facts at a later stage or use the source in the future. Keep copies of reports or photocopies of relevant pages, articles etc in one place for future referral. It's not uncommon and perfectly reasonable to be asked to show the authenticity or source of your information.

All references (unless anonymous) that you use in a published document should refer to the title, of the document, date of publication and the author (if referring to a report or book).

Protecting your sources

When you publish your document, bear in mind that it is perfectly acceptable to refer to anonymous sources to protect people. 'pers comm anon' or 'pers comm confidential' is a commonplace means to refer to an anonymous source such as a conversation or written exchange. Include a date and even a location if this gives added credibility and weight to your reference, but take care not to include information that could lead to a source's anonymity being undermined.

Be sure of your facts

Check your facts again! – most research will draw on facts and figures that have been published by someone else but it doesn't mean that they are true or accurate. It is very easy to make a typing error, or miscalculate a quantity so always try to verify the information. If you are still unsure that a fact or figure is 100% correct, then say so by citing the original source (for example, "according to an area of forests the size of France is destroyed every year").

Peer review

If possible, get a 'peer review' carried out by other independent experts before you publish or distribute your information and get someone to 'fact check' for example, check that figures (quantities etc.) used are consistent.

Remember that a minor mistake – or perceived inaccuracy – can undermine your entire campaign and your own credibility. You must always be able to prove and justify your statements.

Libel

Protect yourself by ensuring the factual accuracy of information, for example, don't accuse a company of illegal or damaging activities without any evidence in support of your statement. Internet discussion lists and emails are sometimes thought to be outside of libel laws – this is incorrect. Libel laws are taken very seriously – particularly in the USA – and repeating an accusation made by someone else is no defence.

On a different legal matter, make sure that you do not break any copyright laws when using any information or visual images. Bear in mind that material gathered on the Internet is subject to the same copyright laws as any other source.