From research to advocacy

A guide to planning, conducting and disseminating research effectively

Version 1 (November 2016)

Education International
Internationale de l'Education
Internacional de la Educación

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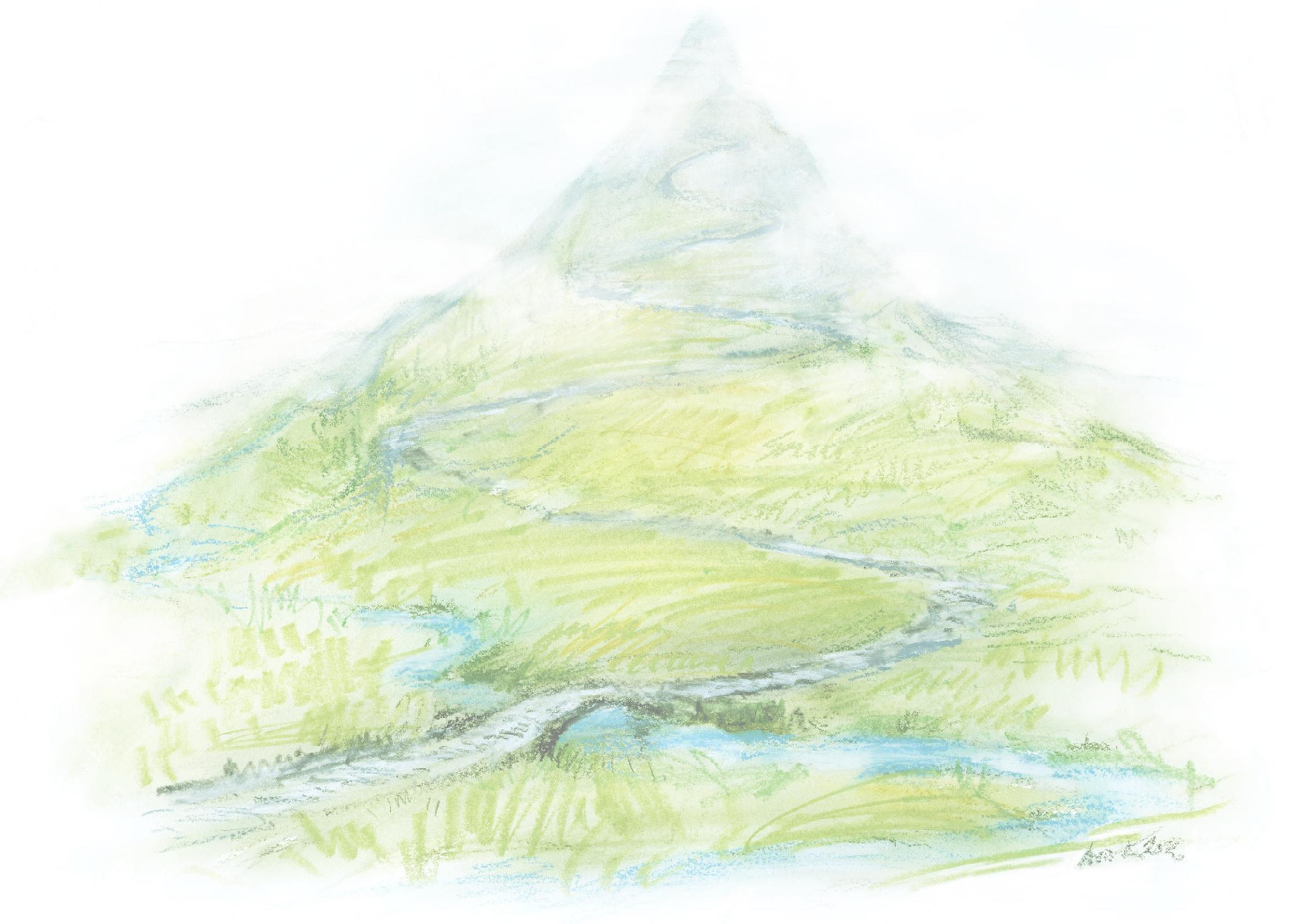
From research to advocacy
– An introduction to the guide

For many education unions research plays a central role in strengthening and informing their advocacy work as well as identifying their membership's priorities. Unions often stress the important contribution of research for their organisation's work in terms of **giving voice to the education profession and establishing a strong evidence base** to challenge the hegemonic and dominant knowledge production of big think tanks, private education businesses as well as philanthropic and international organisations.

Some unions affiliated to EI have established research units or have policy staff doing research themselves. Some cooperate with research institutes or universities and commission research and others have so far not included research work into their union's advocacy strategies at all. The spectrum differs largely also due to limitations in terms of time and finances.

For whom is this toolkit?

This toolkit addresses **education unions** planning to do their own research and those who are planning to commission research. Furthermore, the information outlined below provides the reader with a good basis for discussing a research project with an academic, especially when he/she is not familiar with the union context.

What is in the toolkit?

This toolkit provides insights for **preparing, conducting and disseminating research**. The first chapters provide important guidance on how to identify and shape a research topic, where to find already existing research and what else to consider early on in the research process. In the following chapters, you will find more information on gathering and analysing data for different qualitative (e.g., interviews, field observations, case studies) and quantitative (e.g., surveys) research methods. The last two chapters introduce how to write effective research reports and what to consider when developing a communications and disseminations strategy for the final report.

How to use this toolkit?

In order to successfully conduct your own research project we recommend following the research guidelines as outlined in chapter 1, including the preparation of a request for proposals (RFP). In the following chapters you can find more guidance on how to define the purpose, aims and methodology part of the RFP and/or how to conduct research yourself.

Note, that this toolkit only **introduces** the topics mentioned above, hence, we strongly recommend to do further reading on the specific methods or theories that you are planning to use for your project. In each section you will find some hints on where to look for more detailed information for each topic. Furthermore, on the EI website you can find more examples of research tools and effective research that other unions have conducted.

This is an iterative document and needs to be adapted to each context. We will improve it along the way through incorporating feedback from unions and academics. We hope you find it helpful!
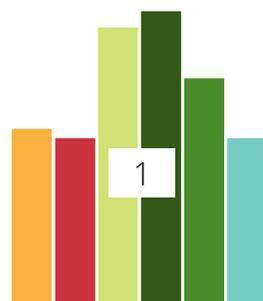
1 First steps: Research guidelines and preparation

1.1 Identifying a research topic: What? Why? Who?

The first step when embarking on a research project should be to ask yourself three basic questions:

1.
What do we want to know?

Your research topic may be mandated by the union membership or your union leadership (e.g., specific policies stating concrete research projects) or you and your colleagues may have decided that research on a specific topic is needed for supporting your advocacy work. Think about how your research will add something new (e.g., give voice to the education profession), challenge existing evidence (e.g., WB, governments) or fill a gap in current knowledge on a topic. Before finalising the topic of research, conduct an online 'quick & dirty' environmental scan to identify who (including other education unions, national and international organisations, union federations) has/is doing what on the topic of your interest.

2.
Why do we want to know it?

Most unions focus on topics that can help them advance education policies and, for instance,

a) shed light on matters around employment (for example, working conditions, terms of employment, qualifications, , salaries or labour rights),

b) investigate matters relating to quality education as a human right and matters of social justice (for example, inclusive education, the privatisation of education, peace education, refugee education or gender inequality in education),

c) improve financing of education, or

d) strengthen the role of trade unions and trade union rights.

The more specific answers to these topics should clearly relate to the next question. This ensures that your research has a practical aim.

3.
Who do you target?

How will you disseminate your findings? Will your research be used for advocacy? How? The intended audience and function (e.g., influence governments, identify membership priorities) of the research will affect many decisions made in the early stages of the research as well as the most appropriate form of final product/s to be produced (article? report? book? exhibition? Infographic?).
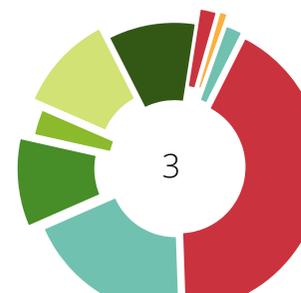
Once you have identified a topic of interest there are a few things to consider from the preparation of the research to the final publication and use for advocacy.

Union policy:
Check the research topic once more against **your union's policies and strategies**. If you work with a researcher make sure you share this information (e.g., policy documents) with him/her.

Consultations:
Early on and throughout the preparation **consult** interested and **relevant people** *within your organisation* (e.g., policy staff, leadership) and *external partners* (e.g., research contacts or allies with relevant knowledge). Also, **involve your communications/media unit from the beginning of the project** so that they are informed and can start developing the media strategies (see chapter 9).

Consult on the **content**, but also what the research will be used for and whether there are any **strategic political events** where the research can be helpful.

Partnerships:
Research does not have to be done in isolation. Consider forming partnerships with other organisations such as policy think tanks, universities or other education unions. Working with others can have **disadvantages** such as having to **compromise on priorities**, having to comply with certain **restrictions** others might have as a result of earmarked funding, or having to **share the rights to the research**. However, working collaboratively can also have **advantages**: partners can contribute **expertise**, research **support** (e.g., provide research assistants), analytical **skills**, and can perhaps even help leverage **funding**.

Budget:
Check how much funding is available. If there isn't any, think about whether there are foundations, government funds etc. that you could apply for. If you are looking for external funding, **make sure to carefully check whether you agree with the potential funders' approach to your research theme and whether there are any restrictions you might have to consider**. You can also try to approach a university and see whether they would be interested in doing or supporting your research.

Scope & scale:
Define the **scope** (e.g., focus on elementary or secondary school or both) **and scale** (e.g., how many teachers and schools are you going to include) of your research. Your decision will be influenced by the type of research (e.g., qualitative (see 5.2) or quantitative (see 5.1), what you want to use it for (e.g., big opinion survey for larger campaigns, awareness raising for a specific group of teachers/Education Support Personnel (ESP) in a specific situation) and/or the budget available.

Final product:
Depending on the **budget**, the **purpose of the research** and the **target audience** consider whether you would like to publish the final report **online and/or in written form**. Alternatively, one option can be to publish the full research

report online and prepare shorter printed summary booklets that can easily be printed, translated and distributed. Also infographics[1] can be a powerful way to share your results.

Timeline:

Estimate the time it takes to complete **all elements of the report until its publication** (e.g., draft, time for feedback, final report, final editing, layout, translation and printing).

Request for proposals (RFP)

A request for proposals (RFP) (see template in Annex 2) is **the basis upon which researchers will draft a proposal/concept note**. It will help choose **the right person to do the work** for you. Hence, the more precise it is the better. However, it is also possible to draft a RFP for internal research projects in order to have a precise and common understanding about the research and to be able to track if the research is going in the right direction.

The RFP could include the following: statement of purpose; significance of the research; background information; union policy on the specific theme/ in case the research is part of a bigger campaign in your union relevant information about the campaign; scope/scale of work; timeframe; aims (i.e. long term goals such as improving working conditions); objectives (i.e. short term goals related to your research such as mapping primary teachers' working conditions); deliverables (e.g., milestone report, final draft report, blog post at the end of the research, presentation at an event).

In case you commission research, state that the research will be commissioned on the basis of contractual terms and conditions (e.g., payments, incentives); state requirements for the preparation of the proposal (e.g., number of words, research framework (see section 8), CV, timeline (e.g., deadline for submission of the proposal, selection date) and contact details.

Find a researcher:

When selecting a researcher based on a request for proposal consider **equal opportunity** (e.g., gender), **content knowledge** and **academic degree** (e.g., union staff, professor, PhD student).

Contracts:

Once you have chosen a researcher and would like to contract the research out, consider the following:

- **Agree on a payment schedule** (e.g., 1/3 of the salary on completion of the agreed research framework, 1/3 on first draft/milestone report, 1/3 on completion). Remember to keep funds aside for printing, translation and/or travel if required.

- Once all the deliverables are agreed, based on RFP/concept note, **sign the contract**.

- **Contract monitoring** should include **milestone reports** which allow you to assess the progress as well as political direction of the research. This should allow you to refuse to publish the research if the research does not meet the criteria established in the contract/terms of reference.

- While tracking towards completion always give **written as well as spoken feedback**.

- Give written feedback on the final draft report and agree on the final version.

Launch:

Develop a **communications strategy for the launch of the research** and/or how it will be used for advocacy, including links to other projects in your union. A **launch event** can be a useful way to link the research report to advocacy work (see chapter 9).

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[1] Infographics are representations of information in a graphic format designed to make the data easily understandable at a glance.

When identifying your research project it might be interesting to also include an analysis of the related national standards and policies as well as international treaties and conventions signed by your government. You can use your research findings (e.g., the educators' voice) to **demonstrate gaps between practice and policy as well as the gaps between national policies and international policies and agreements**. These findings can be used to **convince your government to improve policies** and their implementation at the national level.

Below we have listed a few international agreements that your government might have signed up to or ratified and that can, therefore, be of relevance for your advocacy work. You can find more information on the different education sectors on the **EI website** (*www.ei-ie.org*):

- *ILO/UNESCO Recommendation concerning the Status of Teachers (1966) and Higher Education Teaching Personnel (1997)*

- *ILO Declaration on Fundamental Principles and Rights at Work*

- *UNESCO Recommendation concerning technical and vocational education and training (TVET)*

- *Sustainable Development Goals*

- *UN Human Rights Treaties*

3 Doing intersectional and gender-sensitive research

What does it mean to take a gender-sensitive approach to research²?

Gender-sensitive research takes gender into account as a significant variable in research since in all human societies, women and men are assigned different roles, which impact differently on all aspects of human life. The power relations between women and men can impact strongly on how men and women perceive and experience problems in relation to their unions and to their profession as teachers or ESP, *inter alia*. **Research that is gender-sensitive pays attention to the similarities and the differences between men and women's experiences and viewpoints, giving equal value to each**.

Women make up half of the world's population, so overlooking their experiences and points of view leads to incorrect conclusions, or at least an incomplete picture of the problem.

In general, the choice of research topic, the conceptual framework and methodology, the analysis framework, and the language used in scientific articles tends to reflect male bias and patriarchal values.

Ensuring research is gender-sensitive **does not change the scope of the research, rather, it provides new perspectives, raises new questions, and uses various tools of analysis to generate a more complete picture of a research problem**. By combining the different experiences and

viewpoints of women and men, researchers can enhance our understanding of a research problem. Integrating a gender perspective into research can, therefore, improve its relevance, coverage and quality.

Furthermore, **gender disparities persist both when it comes to women's participation in education unions** (especially in union leadership structures), and in the education sector more broadly (including with regards to girls' access to, and participation in education, and female teachers' ability to progress in the profession).

In addition to applying a 'gender lens' to the research, it has also become very important for researchers to consider the ways in which gender intersects with other social categories or identities such as ethnicity, race, disability or social class, among others. For example, research on the difference in salaries between male and female teachers/ESP in a particular setting would also consider the ways in which salary differences can be impacted by an Indigenous, First Nation or Aboriginal male or female teacher's ethnicity, as well as their gender. The research question would thus be framed around what effect or impact the intersection of the teachers' gender and ethnicity has on salary difference. In their analysis, the researcher would, therefore,

² See Leduc, B. (2009) '*Guidelines for Gender-sensitive Research*'

pay close attention to ways in which ethnicity is gendered, and gender is ethnicised, treating both categories as equal and as co-constructive of each other. An intersectional approach to research is not limited to considering gender as co-constitutive of ethnicity and vice versa, but can be applied to a wide variety of social categories.

Below are some key points taken from the '**Guide to Gender-sensitive Research Methodology**' (2013) developed by the Forum for African Women Educationalists (FAWE) with support from the Norwegian Agency for Development Cooperation (Norad).

1. Research on gender issues **cuts across multiple disciplines** and can be done using qualitative and/or quantitative research methods.

2. Gender-sensitive research questions should reflect the need to **understand both women's and men's perceptions of an issue** (e.g., working conditions), and research questions should be formulated using language that is sensitive to the both genders (e.g., How do the salaries and working conditions of male and female teachers at secondary level in urban and rural settings change during the course of the first ten years of their teaching career?)

3. When conducting a gender-sensitive research, the review of the literature needs to **include literature that considers the differences between women and men's realities**, whatever the topic might be.

4. **The theoretical framework** in gender-sensitive research should not only be amenable to shedding light on the research problem, it should also help us to understand the differences between women's and men's lives and experiences, and why these differences exist.

5. When conducting research that is gender-sensitive, the researcher must ensure that when possible, **an equal number of participants from all genders** are sampled. It is also important for the researcher to avoid using sampling methods that could not only exclude one gender, but also people from marginalised groups including disabled people, minority ethnic or religious groups etc.

6. **Ethical considerations** apply equally to gender-sensitive research as to other types of research. This includes the need **for researchers to remain alert to their own bias and perceptions based on stereotypes**, and to find ways to minimise or eliminate these.

7. A researcher undertaking gender-sensitive research should **recognise the power dynamics** that gender, (but also other categorisations such as social class, ethnicity, religion or race) may create between themselves and any research participants they engage with. Very often the researcher is higher up a power hierarchy than the group they are researching.

8. Taking a gender-sensitive approach to research also means that **research findings are analysed through a gender analysis**. Such an analysis is not limited to simply contrasting or highlighting the differences between women's and men's experiences and positions. Rather, a gender analysis implies that the researcher will **pay attention to the obvious and also the more subtle social and cultural expectations associated with gender** (i.e. women's and men's roles). In paying attention to this aspect of research findings, the researcher must **consider the ways that cultural expectations around gender are incorporated into everyday life, and the ways in which they form the basis of social structures**. A gender analysis will aim to identify the *gendered* consequences of policies and practices that seem to be neutral (in the union or within education, for example). This means identifying the consequences of policies and practices that are presented as neutral, when we know that women and men are positioned differently (and very often unequally) from each other.

Available online at: *http://www.fawe.org/Files/FAWE_Guide_to_Gender_Sensitive_Research.pdf*

4 Doing a literature search

Below you can find more information on **how you can search for specific themes** (e.g., working conditions, privatisation of education) related to specific scientific fields (e.g., education, social science, political science) using the search engines below. Most of the links lead to research databases in English. Where possible we have added French examples as well. If you have good French examples, please share them with us.

4.1 General sources for educational literature (free and publicly available)

Most of the search engines and research databases listed in this section can help you to get an overview of what research exists on a specific topic, however, often (not always) you are only granted access the abstract but not the entire research paper.

We picked a few examples from the following three webpages and listed those which we found most useful below:

1) *http://www.educatorstechnology. com/2013/02/12-fabulous-academic- search-engines.html* ;

2) *http://www.onlineuniversities.com/ blog/2012/07/100-time-saving-search- engines-serious-scholars-revised/*;

3) *https://en.wikipedia.org/wiki/Directory_ of_Open_Access_Journals*

Academia.edu (*www.academia.edu*): Academia.edu is a platform for academics to share research papers. We would like to suggest you register on this platform free of charge as an independent researcher and then you will have full access to a large variety of research.

Google Scholar (*http://scholar.google.com*): Google Scholar is a free academic search engine that indexes academic information from various online web resources.

Google Books (*https://books.google.com/?hl=en*): Here you can search for academic books and sometimes you have full access or can read parts of the book.

Look here for advanced search options: *https://www.google.com/advanced_search*

ERIC The Education Resources Information Center (*http://eric.ed.gov*): This is an online digital library of education research and information and provides ready access to education literature to support the use of educational research and information to improve practice in learning, teaching, educational decision- making, and research.
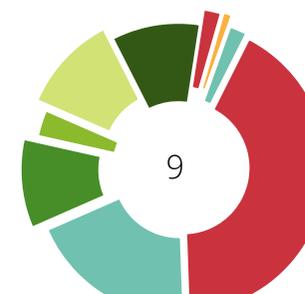
Look here for advice on different search options: *http://eric.ed.gov/?advanced*

SSRN
Social Science Research Network: *http://ssrn.com/en/*

JSTOR:
http://www.jstor.org/action/ showAdvancedSearch?acc=off&wc=on

DOAJ
Directory of Open Access Journals: *https://doaj.org/subjects*

Other engines
Some more search engines that might be useful: **Base** (*http://www.base-search.net*); **CiteuLike** (*http://www.citeulike.org*); **Reefseek** (*http://www. refseek.com*); **SearchTeam** (*http://searchteam. com*)

4.2 Sources specific to EI related themes of interest

Education in Crisis
EI's research website Education in Crisis (*http:// educationincrisis.net*): Under Resources you can find different blog posts and articles, EI publications and other publications related to EI's work areas.

Examples for Working Conditions

Status of Teachers and the Teaching Profession: *http://download.ei-ie.org/Docs/ WebDepot/The%20Status%20of%20Teachers%20 and%20the%20Teaching%20Profession.pdf*

Global Managerial Education Reforms and Teachers: *http://download.ei-ie.org/ Docs/WebDepot/Global%20Managerial%20 Education%20Reforms%20and%20Teachers.pdf*

Education unions
Visit the websites of EI affiliates where you will find research that gives voice to teachers/ESP (this is often lacking in educational research). If you find something interesting, do not hesitate to contact the union. Maybe they can support you with the research and advocacy work on a specific topic.

EI SharePoint Portal
In the Global Response Project Group you can find news articles and publications related to the increasing privatisation and commercialisation in and of education across the globe. It is sorted by country, regions and specific topics (e.g., Low-fee for profit private schools, public versus private education). Please ask Nikola Wachter (*nikola. wachter@ei-ie.org*) for access.

Other sources
Other international organisations that have free online resources

ILO:
http://www.ilo.org/global/research/lang--en/index. htm

UNESCO:
http://www.unesco.org/new/en/unesco/resources/

OECD:
https://data.oecd.org/education.htm
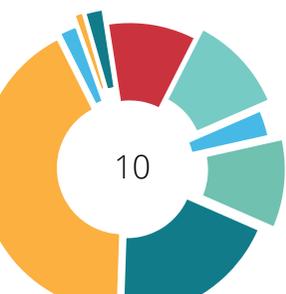
5 Gathering data

This chapter will provide some guidance on how to collect data for your research. In this guide we will focus on qualitative data gathering through field observations, interviews and focus group discussions and quantitative data gathering through paper-based and online-surveys.

Both qualitative and quantitative methods have their advantages and drawbacks. Try to choose your research methods according to which will best fit the topic or answer the research question, but neither method is mutually exclusive. In fact, research that uses mixed methods (both qualitative and quantitative methods) can be particularly useful for advocacy as the methods can support each other to better describe a phenomena.

Access Strategies: Research participants and gate keepers in educational settings

- First contact: **Look into the legal requirements for doing research in educational settings** in your jurisdiction. Ensure that you meet these requirements (permission from the state, Ministry of Education, Education Institutions, district or local council may be necessary).

- In some cases, the central government can forward an authorization letter to the relevant county education officers and sampled education institutions (e.g., schools, universities), on your behalf. Ensure that you also receive a copy of this.

- Alternatively, you can contact the education institution directly. Approach the headteacher/director by phone/email/letter/in person.

- An **initial letter** (to the government or directly to school officials) should outline in writing:
  - Who you are
  - Any organisations/funders that you are working in partnership with

  - The theme/objective of the research
  - If it is possible, guarantee the confidentiality of the school and the participants
  - Outline what will happen with the research once completed
  - How you can be contacted

- **Gate keepers**: Some school owners or principals may not want people to do the surveys. They want to be around to see what people say. This can be a **limiting variable**. It is helpful to **stress that the findings will help to improve the system**, however, access might be denied. If so, don't give up, try another school and use established networks.

- **Anonymity**: Some educational institutions might want a guarantee that their anonymity is secured. It might be helpful to say from the beginning that the institution's and the research participants' **names won't be included in the research report**.

Contact outside the education institution's walls (for education)

- In some cases it could be helpful to **bring teachers and ESP together outside of the working hours**, possibly organising a seminar, and then to ask them to complete the surveys or be interviewed. This will not only **increase the response rate**, but might also allow the participants to **be more open or critical**.

- **Online surveys** can be another way to reach participants outside their school / university environment.

5.1 Quantitative data

First, this toolkit gives insight into quantitative data gathering methods that are associated with numbers and statistics. Aliaga and Gunderson (2000) describe quantitative research methods as "**explaining phenomena by collecting numerical data that are analyzed using mathematically-based methods (in particular, statistics).**" "Explaining phenomena" is something that both qualitative and quantitative research aims to do, but the main difference is that quantitative methods try to do this by using numbers. This is closely linked with the latter part of the above definition, which calls for the use of mathematics. In the end you will, for instance, be able to make statements like **30% of teachers stated they are not satisfied with their working conditions**.

The use of mathematics in explaining phenomena is not inherently more valid, reliable or desirable than using qualitative methods. Certain evaluation questions are better suited to quantitative methods. For example, certain phenomena, such as employment rates and educational attainment, naturally present numerically.

We can convert phenomena that do not naturally occur in numbers into such a form. Rating forms and the use of Likert-type scales (e.g., 1-5) can require respondents to indicate their attitudes and beliefs numerically. We can then apply statistics to these. In this way, the use of quantitative techniques can be quite flexible. For example, you can ask *On a scale from 1-5 how satisfied are you with your working conditions?*
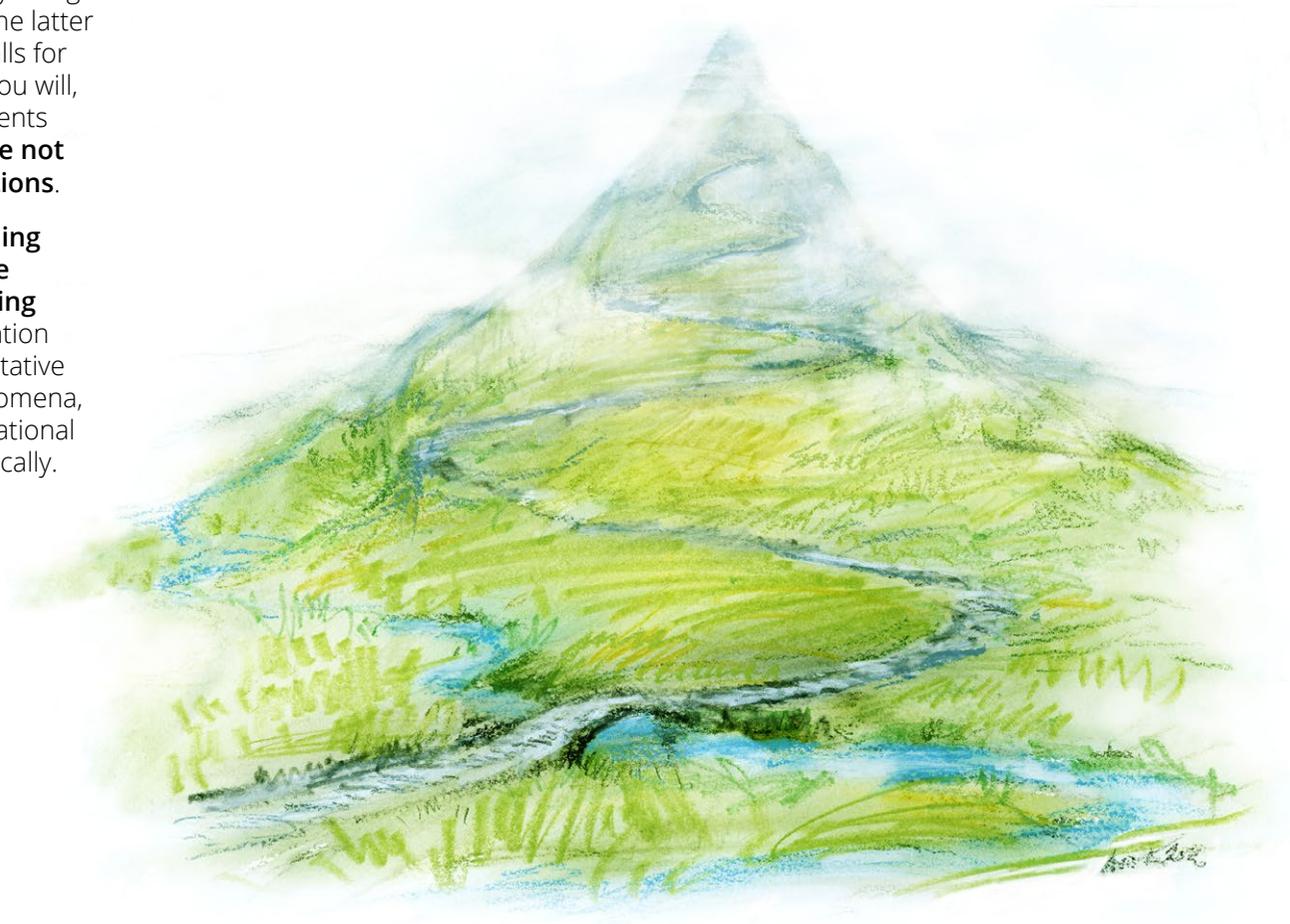
A. Survey design and implementation

A survey is **an instrument to collect information** from a sample of a population. Surveys can be of different types and administered in different ways.

a. Length of surveys

Self-administered surveys and telephone interviews should generally take no longer than **30 minutes**. **Face-to-face** interviews can continue **about an hour**. What also needs to be considered is how much time the respondents have available, how interested they are in actually completing the survey and what resources you have available.

b. Different types of questions

Open-ended:

Example:

Why do you feel demotivated at school?

The advantage of open-ended questions is that the participant has more freedom in answering, hence, you might **get answers that you did not expect** and you give more **voice to the participant**. Furthermore, you might get some interesting quotes that you can use for you advocacy work. Keep in mind that these questions are a bit **more difficult to code** (e.g., translated into a percentage or number, see chapter 6.2) afterwards.

Closed-ended:

Responses to closed-ended questions are **easy to code** and analyse. However, **they limit the amount of information** the respondent can provide and, hence, also limit the insights you can get.

Examples:

Categorical data questions:

Q Please mark the type of education personnel your organisation primarily represents (more than one selection is possible)*:

A ☐ Early Childhood Education (ECE)
☐ Primary Schools ☐ Secondary Schools

Ordinal data questions:

Q Which of the following topics would you most like to explore in depth (RANK in order of importance, 1 being high, 3 being average and 5 being low).

A	1	2	3	4	5
privatisation	☐	☐	☐	☐	☐
technology	☐	☐	☐	☐	☐
financing	☐	☐	☐	☐	☐

Interval data questions:

Q How long have you been working as a teacher?

A a) ☐ 1--3 years b) ☐ 4-6 years
c) ☐ 7-9 years d) ☐ More than 10 years

Ratio data questions:

Q How old are you?

A _____

* This question is required
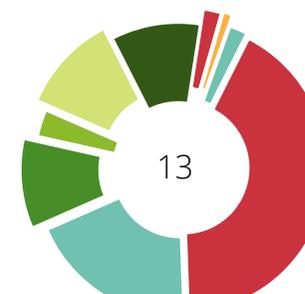
c. Ordering of questions

Begin by asking relatively **objective questions before subjective ones**.

Sensitive questions should be placed well after the start of the survey but also well before its conclusion.

Depending on the number and complexity of your questions you will have to decide whether to state **relatively easy-to-answer** questions (such as background information) at the end or at the beginning.

Avoid items that look alike.

Questions should be in a **logical order**. You can, for instance, organise your survey into different sections, such as Personal Information, Professional Background, Working Conditions.

d. Piloting

Piloting (i.e. testing the survey) is important. This will give the researcher **a good idea of what needs to be changed**. This can be with colleagues and also with potential survey participants.

Test logistics of administration:

> How long does it take to complete the survey?
>
> Is there sufficient room to answer questions on the survey?
>
> Can it be self-administered without presence of the researcher and additional instruction?

Test success of the survey:

> Are the questions clear and unambiguous?
>
> Are the answer options distinct and comprehensive?
>
> Are you able to get the information you need?

e. Survey Administration *-Personal*

Face-to-Face Structured Survey

Here, the researcher meets the participants and fills out the survey while asking the participants the survey questions.

> **Pros:** Questions being asked directly to the respondent by the researcher usually produce a **more informative response**. This also provides the opportunity for the researcher **to observe the participants**.
>
> **Cons:** There is a **higher chance of bias** due to the interaction between the respondent and the interviewer. The principle of **anonymity is lost**. Conducting face-to-face interviews can be **expensive and time-consuming**, especially if the respondents are geographically dispersed.

Telephone Survey – Calling the participants

Here, the researcher calls the participants and fills out the survey while asking the participants the survey questions.

> **Pros:** This method can be used for **asking consequential questions**. It

provides anonymity better than face-to-face interviews.

Cons: Telephone surveys are not ideal for data gathering which requires the participants to see visual material. In addition, telephone calls for survey purposes are **not appropriate if long or complex questions are to be asked**.

f. Survey Administration -Self-administered

Paper-and-Pencil Survey:

Here the participants themselves fill out the survey.

Pros: A traditional survey administration method, the paper-and-pencil survey is ideal **for respondents who are not computer literate** or do not have access to the Internet.

Cons: The paper-and-pencil self-administered technique usually **requires the researcher to be present** during the administration. It also necessitates doing the **expensive reproduction** of survey questionnaires, **manual distribution** of the questionnaires to the respondents and **manual coding** of the survey results (e.g., typing the results into an excel sheet).

Online Survey: Participants fill out the survey online

Here the participants themselves fill out the survey online.

Pros: The online survey technique is ideal for a survey requiring a **large sample size and/or a sample whose members live in wide geographical areas**. This is less expensive than sending surveys through mail. Online-survey tools **facilitate the analysis of data and the generation of graphs** (e.g., *survey gizmo* or *survey monkey*). If available, you can also use the latest version of *Excel* as part of the 365 Microsoft package which allows you to prepare and analyse online surveys. In case your union has server

Name	Survey Monkey	Survey Gizmo	Lime Survey (Open Source)
# of questions	10 questions	Unlimited questions	Unlimited questions
# of responses	100 responses	Unlimited responses	Unlimited responses
Types of questions	No question logic	All question types	All question types
Report format	Only online reports	Summary and CSV reports	Text, CSV, PDF, SPSS, MS Excel format
Analysis tools	No filtering for analysis possible	No filtering for analysis possible	Filtering for analysis possible
Website	*https://www.surveymonkey.com/pricing/upgrade/details/?ps=1*	*https://www.surveygizmo.com/plans-pricing/#*	*https.limesurvey.org/?jumpto=features*
Upgrades	More features for 35€/month	More features for 25€/month	/

Combining online and paper-based surveys: **Getting there step by step:**

Prepare

- Sign up for an online survey tool.

- Prepare your survey questions online. If this is the first time you use the programme, you will need time to get acquainted with it.

- The online survey tools allow you to prepare a printable Word version. After some formatting you can print this document and share it with participants without internet connection.

- With online-surveys it us crucial to pilot test the survey.

Share

- Once the survey is ready you can share the link to the survey via email with those participants who have internet on their phone or computer. Most survey tools create cellphone compatible versions of the survey, hence, participants can use their cellphones to take part in the survey.

- Share the Word document of your survey with those without internet connection.

- You can also consider organising a meeting where participants can fill out the survey on an available laptop/computer in the meeting room.

- If you have a smartphone, you might be able to collect survey answers offline and then upload them.

Monitor

- Monitor the participation online (e.g., sort out/delete incomplete answers, follow up).

- You can then collect the paper-based versions and type them manually into the online-survey using the survey link. Then you have all survey results (online and paper-based together).

Analyse

- Online data analysis: Generate graphs, filter results (e.g., gender, head teacher)

- Analyse open-ended questions (See 6.1 A)

- Do the final in-depth analysis

B. Response rate: How does it affect the validity of my results?

Be aware that **if the response rate** (number of survey participants) for your survey/questionnaire **is very low**, **your results will be less credible**. Therefore, when choosing your sample size, take into account what your expected response rate will be and try to ensure that your final sample of completed questionnaires/surveys is adequate. You can **calculate the percentage** threshold of returns necessary for your results to remain credible with the help of a Survey Monkey formula. All the information you need in order to calculate your sample size is available on this website: *http://help.surveymonkey.com/articles/en_US/kb/How-many-respondents-do-I-need*

Tips for how to increase the response rate

- Send respondents a **pre-letter**; include a cover letter with the survey.

- Offer to send respondents a **summary of the results**.

- Follow the KISS principle. "KISS" stands for "**Keep It Short and Simple**". Higher response and completion rates are associated with concise, simple, and easy-to-answer survey questionnaires.

- Keep the questionnaire **procedures simple**.

- Offer a **small compensation** or to make a gift or donation to their organization.

- Maintain a **professional-looking survey** (Double-check the instructions, spacing, layout, and printed look of the survey before administering them.).

- **Explain why sensitive questions** are being asked.

- **Ensure confidentiality** (and anonymity, if it applies).
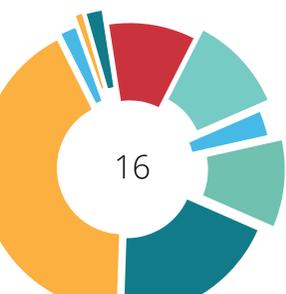
space you can also use *limesurvey*, which is free of charge. You can also sign up for OpenShift who offer server space for free.

Cons: The research **participants must be computer literate** in order to answer the survey questions online. It also **requires internet connection** and electricity availability. This method may also require giving an incentive to the participants. Usually you have to pay for the use of online-survey tools (see some examples below, status of the figures as of Sept 2016):

Combining online and paper-based surveys

In order to achieve a **higher response rate** and to make it **easier and cheaper to administer and analyse** the survey, you can use a mixture of online- and paper-based surveys.

5.2 Qualitative Data

A. Why/why not use qualitative methods?

Qualitative research allows for **in-depth exploration**

of a phenomena, whilst in many ways quantitative data just scratches the surface. Qualitative data takes into account the complexity of social reality. It can be used to describe or understand norms, relationships between variables, and underlying reasons and motivations. For unions, qualitative research can be **effective for advocacy, as it can explain problems in current education policy in detail without flattening the complexity of the issue**. In addition, research that focuses on the personal narratives or intricate **stories of individuals and groups is useful for advocacy** as it can draw people in – human nature is interested in vivid stories rather than pure statistics.

However, investigating a phenomena in a large amount of detail and attention to context means that the sample size must be much smaller than that used in quantitative data. This means that **qualitative data is usually not generalizable** from the sample, that is to say, it cannot be assumed that the information gained about the sample reflects the broader population. However, it is possible to generalize to theory –

qualitative data can lead to a researcher creating a new theory which suggests that x happens in certain way, under y conditions for z reason. This theory can then be corroborated or refuted by other researchers.

Designing your qualitative research means that you need to choose your methods according to your epistemological assumptions and theoretical framework.

Epistemological standpoints

There are various different ways in which qualitative data can be collected. Your choice of qualitative methodology will depend on your epistemological assumptions. Epistemology refers to **differing points of view as to how social knowledge is produced**. For example, **positivists' defence of objective truth** leads them to suggest that social reality should be studied using methods that are similar to those used in the natural sciences (this is no

longer a common standpoint). On the other end of the epistemological scale, other researchers use **interpretative methods such as ethnography** that **emphasise subjectivity**.

Other common epistemological standpoints include functionalism, structuralism, realism, critical realism, social constructivism, post-structuralism and phenomenology. Consider what your epistemological assumptions are and how this affects the qualitative methods you use.

Theoretical framework

A theoretical framework is t**he use of theory** (ideas that previous authors have had on a topic) **to guide the way that you approach a topic**. It is necessary to have a clear theoretical framework to underpin your research. Survey the literature to see **what perspectives previous researchers have taken on your chosen topic** and read widely on related issues or approaches that could be considered. You can then use an already established theory as a lens through which you see a phenomena - it provides conceptual framework for your investigation. For example, if you choose to research the importance of Technical Vocational Education and Training (TVET), there are numerous theoretical frameworks that could be used to investigate the topic. Research on TVET framed by Sen's capabilities approach (as done by Tikly, 2013) will be very different to research on TVET framed by economic theory. Your theoretical framework will

reflect your epistemological assumptions.

B. Qualitative Research Methods

There are a variety of ways to do qualitative research such as phenomenology or grounded theory. However, this section looks just at two of the most common approaches: ethnography and the case study method.

Ethnography

Ethnography involves **long-term sustained immersion** (usually months or years) **into a certain social context**. Using open-ended interviews and participant observation (see below), the researcher aims to uncover the intricate processes at play in otherwise confusing social customs, norms or behaviour. **Becoming involved in the social reality of your participants allows you to identify details or causal links that may not have been identifiable to total outsiders**. Additionally, getting to know your participants and building rapport with them may give you access to knowledge that would otherwise not have been shared with you.

When conducting ethnographic research, it is vital to be open-minded. Do not judge what you see according to your own terms. Rather, try to understand your research participants' way of viewing their social reality.

Case studies

The case study method means **investigating a particular 'case'**. A

'case' can refer to a variety of things, for example one setting (e.g., an early childhood education centre) an individual (e.g., a principal) a single group of documents (e.g., education white papers from a specified rang of years), a particular event (e.g., an action by a union) or region.

The case study method is similar to that of ethnography in that **it investigates a complex issue in its own context**. However, **more emphasis is given to interviews** than participant observation. In addition the theoretical framework can be employed more loosely than in ethnographic work. Other differences include the fact that there is less emphasis given to trying to understand a phenomenon through the eyes of the participants, and **long term involvement in the field is not seen as a necessity**. This last point often makes the case studies more practical as they can be less time consuming and less expensive.

C. Qualitative Data Gathering Methods

(Participant) Observation

An example of how field notes can be made.

Time	Description (without your judgement)	Interpretation (add how and why)
13.10	*The teacher marks papers quickly as she eats her sandwiches.*	*The teacher has to handle many things at the same time and seems quite stressed.*

Participant observation forms the **backbone of ethnography**, but this method can also be used **as part of a case study** to triangulate (back up/use different methods and types of samples for data collection/ capture different dimensions of the same phenomena) information from interviews.

Observations can be made **as an outsider** (for example, simply watching a class), or **as a participant**, which can sometimes lead to richer findings (for example, taking part in the class, talking to the students, helping the teacher, moving around in the room etc.).

If you are interested in researching processes that occur in your own union, you are instantly a participant as well as an observer because you are an insider. In this case, you must strive to 'make the familiar strange' by looking at your own organization with the eye of an outsider. What are the ins and outs of union processes that you usually take for granted?

Field notes are used to record what happened and your observations of the observed event/behaviour/activity. They can be made in a variety of manners - by hand, on a tablet, or into a voice recorder. They should be detailed and made in vivo (in the moment) or promptly after so details are not forgotten. **Be selective about what you note down** – your field notes will not recreate reality but will focus on observations that relate to your research question. You might jot down information about actors, events,

context (weather etc.), interactions, activities, movement or space.

Whilst your descriptions will always be subjective (i.e. no two persons have exactly the same perception of reality) try to **be aware of the difference between that which you observe and your interpretations**. Try to avoid characterising what people do in a way that relies on generalisations (e.g., describing someone as 'inefficient').

Alternatively, some researchers like to simply jot down notes in the style of a journal (particularly ethnographers). Observations can also be recorded through video, photos and sound recordings. However, if using a camera, be aware that its presence can have an effect on the data gathered, perhaps stopping participants from behaving 'naturally'.

Here you can find more information on participant observation: *https://assessment.trinity.duke.edu/documents/ParticipantObservationFieldGuide.pdf*

Types of Interviews

1) <u>Structured interviews</u>: The interviewer asks the interviewee a set list of questions. This style of interview is quick but gives little depth.

2) <u>Semi-structured interviews</u>: This type of interview is conducted using a list of pre-prepared questions/themes as a guide. The interviewer retains a degree of flexibility and can focus on topics that the interviewee brings up as well as what they had planned to talk about.

3) <u>Unstructured interviews</u>: This style of interview allows the participant to guide the interview. Totally unstructured interviews are not common as it can be difficult for the participant, be very long, or lead to the researcher getting lots of irrelevant information.

Interview: tips

Writing interview questions:

- Start with questions about personal identity to ease into the interview.
- Place 'easy', non-controversial, non-emotive questions at the beginning of the interview.
- Place more complex or personal questions near the end.
- Make sure all questions are easy to understand and that terms used are specific.
- In some cases it might be appropriate to use drawings, video, photographs etc. as stimulus for the interview or as tools for the participants to express their ideas.
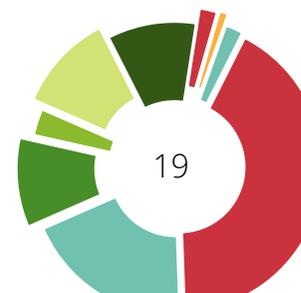
Tips for conducting the interview:

- **Make sure the interviewees grants permission to be recorded**.

- **ALWAYS double check that your recorder/camera is working properly before starting the interview**.

- **Be nice!** Make the interviewee feel comfortable and relaxed.

- **Do not read your questions**, try to build a connection with your interviewee and create an atmosphere of conversation. Make notes about body language or other factors that will not be captured on the recording) but remember that you do not need to write down everything that is said (this will be recorded). Making too many notes could distract the interviewee or hinder you from building rapport with them. Remember that making lots of notes at certain moments and not others sends a message to your interview about which of the topics they talk about are most interesting or important to you.

- **Be interested and empathetic** but do not finish your interviewee's sentences, (dis)agree or give your opinion.

- **Be flexible**. Ask follow up questions, either for clarification or for more information on a subject.

Interviews

Interviews can be used:

a) to **gather data about a phenomenon itself** (if the interviewee is reliable or the information can be confirmed by with other data)

b) to find out about t**he interviewee's experiences or perceptions** relating to a phenomena.

Motivations for actions, information about delicate subjects, or information about past events are best found out through interviews.

Location and time

The location and time of the interview may make a difference to the outcomes of the interview. Consider: what would be the effect of interviewing a teacher in her/his classroom during the middle of a busy school day, compared to interviewing them in a café after school?

If, for example, you want to discuss problems with teachers' working conditions, perhaps a location off the school premises, after school is best. Think carefully about where and when conducting interviews dealing with sensitive matters in order to ensure that they are no interruptions and the interview cannot be overheard. Always choose quiet spaces so that your interviews can be easily recorded with good sound quality. In some cases you may, however, decide not to record the interview in order to make the interviewee feel more comfortable.

Focus Group Discussions

Focus groups are an alternative way to gather data. Here, numerous participants are gathered together to discuss a topic related to your research question. The participants are usually chosen because they have certain characteristics or knowledge of the topic.

Why hold focus groups?

- Having a focus group could save time (instead of individual interviews).

- Participants may give you more useful data than might have been given in an interview as they can be triggered by others to share experiences or build on what other participants have said.

- Participants may help each other to remember forgotten details.

- Being in a group might make people feel more comfortable and release their inhabitations (for sensitive or personal topics private one-to-one interviews might be more appropriate)

- It can help you to identify points of agreement and contestation amongst participants

- You can identify shared/common behaviour.

Reflexivity/Positionality

The nature of the data collection process in qualitative research means that the research can never be fully separated from the researcher. **There is always**

Interview: Tips for conducting focus groups

Planning:

- **Choose your participants carefully**:
  - Think about **power dynamics** that might arise in the group.
  - Think about if it is more appropriate for your research to have participants **who know each other or strangers**.
- **5-10 participants** is recommended to ensure that the group feel lively, but that every participant also has a chance to voice their views.
- Conduct multiple **focus groups per strata** (e.g., perhaps three groups with all women, 3 with all men, and three mixed gender).
- **Don't use more than 10 questions** to ensure that each question can be adequately covered in discussion.
- **Use open ended questions**.
- **Prepare an interview protocol**.

More information:

- *https://assessment.trinity.duke.edu/documents/How_to_Conduct_a_Focus_Group.pdf*
- *http://ojp.gov/ovc/pubs/victimswithdisabilities/pdf/rotocolforInterviewsGroupsand Meetings.pdf*

Moderating:

- **Encourage interaction** and group dynamics by placing chairs in a circle.
- **Avoid asking 'why'** but instead ask participants to describe their experiences.
- As a moderator, d**on't give your own opinions**.
- **Establish rapport** and a safe space.
- **Don't be afraid to redirect groups that go off topic**.
- **Ask participants to say their name before they speak**, but if they don't, Interject with participants' names so that you can then identify speakers from the sound recording.

If you have the resources to film, **consider filming the group** in addition to using a voice recorder [some places may not have the resources to film]. This solves the problem above but also allows you to study the body language of your participants as part of your analysis.

an element of subjectivity to **- who the researcher is inevi** **makes a difference to the re** this in mind, think about the in the research of various aspect identity, including:

- Personal experiences
- Gender
- Ethnicity/race
- Class
- Age
- Political affiliations
- Values
- Status

What is the power relationship you and your participants? How your worldview or ideological s affect the interpretation of you necessary to be aware of and t examine your own role in the process.

E.g., Imagine you are an educ *support worker who supports* *with dyslexia. You are doing re* *about inclusive classroom pra* *How might your background* *dynamics of an interview you* *classroom teacher?*

Importantly, union research (w conducted by a union membe funded by a union) will always a particular standpoint. Consid implications of the researcher' connections on the data that is as well as the analysis of it.

5.3 Sampling

There are **two main types of sampling: probability sampling and non-probability sampling**. Choose your sampling method depending on the type of research (i.e. quantitative or qualitative) and the scope (i.e. number of participants) of the project you are planning to engage in. For qualitative research you would usually go for non-probability sampling as listed in section 5.3.1 and for quantitative research you would usually go with probability sampling - those sampling methods listed in section 5.3.2 - or work with a combination of both.

A.   Non–Probability sampling

Purposive sampling

Units are chosen according to specific criteria that makes them relevant to the study. For example, if the study is about teachers unions, perhaps you choose to interview only teachers or ESP who are union representatives. The size of the sample can be determined by the point of theoretical saturation (when new data no longer brings further useful information for the study).

Sometimes units are chosen because they are 'normal/typical' cases. For example, you might choose to study the effect of socio-economic background on learning at 5 'average' schools. The findings are not generalizable, but your sample might be illustrative of what happens in other 'similar' schools.

Alternatively, units are chosen because they are 'extreme' cases. This means that they are chosen because they are special or unusual. For example, if you want to find out about union representation in schools, it might be interesting to investigate a school that has no union members at all and to find out about the context/ cause/reasons for this.

Quota Sampling

Units are chosen according to selected criteria. For example, a sample could include participants on the grounds of their gender, socio-economic status, age, number of years of teaching experience etc. in percentages that match a larger population. So, if in the country you do research, 70% of primary school teachers are women, you might choose to reflect this same ratio of men/women in your sample of primary school teachers.

Snowball Sampling

Researchers find participants/schools/ organisations to take part in their study, who then refer them to others who could be involved. This allows for researchers to conveniently find participants who might otherwise have been difficult to access. Be aware that 'gatekeepers' could direct you towards certain people/educational institutions for reasons that they do not disclose.

Convenience Sampling

The sample is chosen for convenience based on **accessibility**. **This should be avoided** if possible.

B.   Probability Sampling

Probability sampling works on the basis of **random selection methods**. It aims at ensuring that the different units in your population (e.g., primary school teachers in private schools) have equal probabilities of being chosen. Random sampling is usually used **when you work with a large sample size and you have the contact information for the entire population** (i.e. all primary school teachers have an equal chance to be chosen). Probability sampling can be more expensive and time-consuming.

Random Sampling

Every member has an **equal chance**. This is, however, often difficult as it is almost impossible to identify every member of the population.

Stratified Sampling

Here you **divide the population into subgroups (strata) and members are randomly selected from each group**. For instance, depending on the
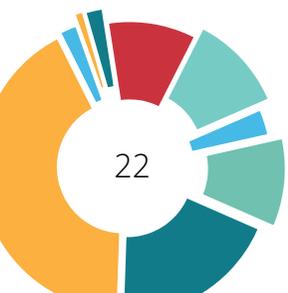
objectives of your study you can divide your population according to gender or years working in the profession. And then within the identified strata you can randomly pick participants.

Systematic Sampling

This sampling method is often used instead of random sampling. Here a **specific system is applied to select members** such as every 10th person on an alphabetized list.

Cluster random Sampling

Here the **population is divided into clusters, clusters are randomly selected** and all members of the cluster selected are sampled.

5.4 Training Research Assistants

For bigger research projects some researchers work with research assistants. **This can help increase the sample size, but it might also have an impact on the outcome**.

You should consider the following:

1) Choose your research assistance carefully. It is beneficial if they have research experience (e.g., graduate students).

2) **Train** them well for their tasks.

3) Working with several people on a project means t**hat everyone might ask questions differently**. You need to **build in data safety checks** in order to avoid this from happening.

4) Coordinate the work well so you **stick to your timelines**.

5) Think about the **match between the research assistants and the subjects** e.g., if you are working with school students, younger research assistants might be more effective.

6) **Make sure they are well informed** about the whole project.

Before sending research assistants to do the field work, **prepare a sheet for them that lists all the things that they should consider before gathering the data, while gathering the data and afterwards**. In Annex 1 you find an example of such a sheet that was prepared for research assistants who administered a questionnaire to teachers concerning their working conditions.

Sampling: Tips for dealing with different types of research participants

Parents: Parents can be accessed through a school or directly at their homes. Ensure that questions for them relate to their own experiences rather than their perception of what happens at school or their interpretation of their child's experiences.

Teachers/ESP: Education professionals are very busy. Think about how to incentivise teachers to take part in your study (why is this study important?) as well as how and when they can best be interviewed or surveyed. Be aware that they may have little

job security. If possible, build rapport by talking about your own teaching experience.

Students: Power relations are important to take into account when interviewing/surveying students, especially if they are under 18 years old. Perhaps the student will be intimidated by your age, status or position as a researcher. Think about an interview setting or context that might help to make them feel at ease or to ease building rapport. Be clear that you are interested in understanding their experiences and

perceptions on a topic, not in getting right/wrong answers.

Officials/'elites': It is necessary to appear professional, organised, and prepared when interviewing or surveying elites. Ensure that you are clear about how long the interview is going to take and do not ask questions that could easily be found out in other ways. Don't allow the interviewee to control the interview and speak to you at length about a different topic irrelevant to your research.

6 Analysing data

6.1 Qualitative Data

The data you collect through interviews, field-notes, video/sound, photos, journals, documents etc. needs to be analysed. However, the research process should not always be considered as 1) Data gathering 2) Data Analysis. In fact, many researchers analyse their data whilst they are still gathering it. **Often the qualitative research process is iterative, meaning that data gathering and analysis inform and shape each other repeatedly**. Sometimes the research design or the specific direction of the research can change according to analysis made of the data gathered in the early stages of the project.

A. Coding

Sections of text or video/sound can be coded **by hand** (using highlighters, colours or index cards in a box can be helpful) or by **using computer software**. There are various programs that can help researchers to organise and analyse data. Some commonly used ones are Atlas.ti or ELAN (for video/sound). ELAN needs to be paid for **but a trial version of Atlas.ti** can be found here: *www.Atlasti.com*. The trial is for only ten documents but it can be used for an unlimited time period.

Codes are topics or themes. They are used in order to help categorise and make sense of our interviews or field-notes. Sometimes codes can simply be used to count how many times a word/phrase occurs. However, this is less useful than if codes are used to interpret the data.

Types of coding:

Inductive analysis: Codes can be **pre-decided according to theory** (you have decided on codes which you think are useful for your research)

Transcription of interviews

Whilst interviews can be analysed straight from the sound/video, it is usually easiest to first transcribe them. This takes considerable time, so if you have some interviews that are irrelevant to your research question, don't bother transcribing them!

Transcription should be as much of **an accurate representation of what was said** (including pauses, laughs, sounds etc.) as possible. **To do this, certain conventions are used** (for example, three dots (…) represent an untimed pause). The following link: *http://www.sscnet.ucla.edu/anthro/faculty/duranti/audvis/annotate.htm* gives one set of conventions but there are many. It doesn't matter which you use, as long as it is used consistently.

Nonetheless, remember that n**o matter how 'accurately' you transcribe, the** transcription is always only a rough representation of what actually happened in the interview, as numerous factors such as the interviewee's tone of voice, timing and pace of what was said, certain non-verbal noises, body language and atmosphere in the room. all carry meaning but cannot be recorded in the transcription.

Deductive analysis: Codes can e**merge from the data** (you decide on the codes are according to what is in your data)

Or a mixture of both can be used.

How to code

1. Begin the coding process by **familiarising yourself with your data**. Read through your data in detail or listen to your interview multiple times.

2. Next **label** words, phrases, paragraphs or chunks that you think are relevant. Labels can be concepts, processes, activities or anything that you think is relevant because it is repeated, it is surprising, it relates to theory or because it is marked as important by an interviewee. Don't be afraid to code a lot of text. This is called 'open coding'.

3. Now go again through the codes that you have. **Remove the codes that are not relevant and group together codes that are linked to create categories**. For example, if you have the codes: school infrastructure; facilities and class-size, you can group these together under the category labelled 'learning conditions'.

4. Remove the categories that are not relevant and **decide how the categories are linked to each other** (ensuring that this refers back to your research question and research literature).

For example:

- a is cause of b
- a is part of b
- a is associated with b

This is called axial coding. You could also then identify a core variable from all of your data and go back to code with this. This is called 'selective coding'.

5. Finally, the results can be **visualised and made into a figure/diagram** if this is useful.

In your research report, **be transparent about how you did your coding**. When multiple researchers are taking part in one study, ensure that protocols are used to **achieve inter-coder reliability**. It is important to have **a coding manual** that clearly specifies when codes will be applied. Discuss coding judgements together as part of training and **a pilot analysis as a researcher group** before independently analysing to try to align coding judgements.

This video explains more about the coding process: *https://www.youtube.com/watch?v=DRL4PF2u9XA*

As does this: *https://www.youtube.com/watch?v=7X7VuQxPfpk*

Your findings from the coding process can then be interpreted, perhaps developing new models or theories. Check these interpretations with others, or look back to the data to see whether the model holds true.

Analysing focus group data

When coding focus group transcripts, do not assume that the data should be treated as the same as one-one interviews but simply with multiple speakers. Instead, **take the group as the unit of analysis**. Consider where there was group consensus, and how quickly/slowly this agreement emerged, and look for bias, dominant voices, 'group-think' that could have affected the outcome of the group.

B. Documentary Analysis

Documents that are relevant to your study can be analysed **using the coding system above (6 A)**, simply read to find specific information, or analysed to **look for repeated themes/words/information**. You can, for instance, analyse different government policies and publications on a specific topic and identify what the governing discourses are and what topics are neglected.

Here is a video on policy analysis: *https://www.youtube.com/watch?v=5xHLYxeNWXc*

Critical discourse analysis (CDA)

CDA is a particular model of **analysis used to show how discourse is used for social (in)justice or (non) discrimination**. CDA of texts shows how language can be used to reproduce certain power relations or (in)equality. Analysis of words, images, phrases, metaphors, linguistic devices is done at a variety of different levels, thereby showing the relationship between discourse and social context.
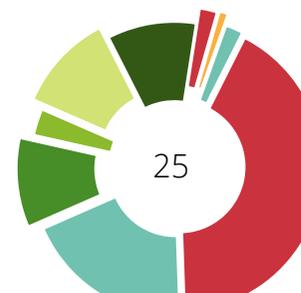
6.2 Quantitative data

Once you have collected your paper-based surveys or closed the online-survey it is time to analyse your data. Below we give some insights on how to organise your data and how to analyse it afterwards.

1: Organise your data

Paper-based survey: In case you have conducted a **paper-based survey, Excel (see below) or SPSS can be used and you need to type in every filled out sheet manually**. Both allow you to code and analyse your data as well as to create graphs.

Online-survey: In case you have prepared your survey **using an online-survey service provider you do not have to type in any data** and you can generate graphs easily with the online tool.

Combination of paper-based & online-survey: In case you have also collected paper-based surveys AND used an online service tool, you need to type in each filled out sheet online. You do so by using the survey participation link and "pretending" to be a survey participant (see Combining online and paper-based surveys in section 5 A).

A bit more information on quantitative coding: *https://www.youtube.com/ watch?v=rs8L_xzU2_U*

If you have conducted a **paper-based survey** to collect your data and have all the completed paper surveys in front of you, you can start organising your data in an excel sheet. You can use Word or Open Office (a free and open source programme) or an SPSS spread sheet.

We have prepared a small example for you below and recommend you to watch this youtube video: *https://www.youtube.com/ watch?v=V4J6xYoKwAo*. However, be aware of the cat ☺.

Sample survey and data sheet

Q1 *How long have you been working as a teacher?*

A1 a) ☐1-3 years b) ☐4-6 years
c) ☐7-9 years d) ☐More than 10 years

Q2 *Which grades have you been teaching? (you can pick more than one)*

A2 a) ☐ 1 &2   b) ☐ 3&4   c) ☐ 5&6

Q3 *When at work, how motivated do you feel? (pick one)*

A3 ☐ very demotivated   ☐ demotivated
☐ motivated   ☐ very motivated

Q4 *Why do you feel demotivated?*

A4 _____

1) **Develop short text codes** for each of the **questions** that you will be including in the database.

Single answer questions: For questions like How long have you been working as a teacher?, where participants should only tick one answer, you could abbreviate the question with : "**Q1. Teaching**" (see Excel table below: field B2).

Multiple answer questions: For questions where participants can check more than one answer like *Which grades have you been teaching?* more work is required. Here you need to have columns for each possible answer. You could abbreviate as follows: **Q2a Grades** (for grade 1&2); **Q2b Grades** (for grade 3&4); **Q2c Grades** (for grade5&6) (see Excel table below: field C2-E2)

2) **Develop short number codes** for the **participants**. Assign each filled out survey/each participant a number (**ID#**: field A2). Note it on the filled out surveys so that you can always go back to it.

	A	B	C	D	E	F	G
1	What motivates or demotivates teachers?						
2	ID #	Q1. Teaching	Q2 a Grades	Q2b Grades	Q2c Grades	Q3. Motivation	Q4. Why demotivated
3	1	2	1	2	1		Not enough salary
4	2	3	1	1	1		The headteacher doesn't support me.
5	3	4	2	2	1		I would like to be consulted.
6	4	1	1	1	2		Not enough salary.

3) **Develop short number codes** for the **answers**.

Closed-ended questions (questions 1-3).

For questions where the participants can only check one answer (questions 1 and 3), assign a number to each of these (e.g., 1-3 years=**1**, 4-6 years =**2**, etc.) and depending on what the participants have chosen input these numbers into the excel sheet.

For questions where the participants can check more than one answer (question 2), you have to code differently. In this example for question 2 on the different grades we have chosen to input a **1** into the excel sheet when the answer was picked and a **2** when an answer wasn't picked.

The third participant with the **ID#=3** has, for instance, only worked in grade 5&6 (see below).

Hence, we put the following into the excel table:

Q2a =**2**,

Q2b=**2**,

Q2c=**1**

Which grades have you been teaching? (you can pick more than one)

a) ☐ 1 &2   b) ☐ 3&4   c) ☑ 5&6

Open-ended questions

Step 1) Type the open ended questions into your excel sheet (see Excel table above: column G).

Step 2) Determine the different themes.

Here the quantitative approach is leaning a bit towards qualitative research and the researcher sometimes has to interpret the answers while categorising and assigning them to different themes.

In the visual example below we have identified three different reoccurring themes from our sample survey above (Why do you feel demotivated):

headteachers, participation and salary. Here it was easy because the sample size was quite small. **If you are dealing with a larger sample size it can be useful to determine the themes by looking only at a proportion of responses**. We would recommend to not use too many categories, maybe 10. The rest you can code as Other=0.

Step 3) Group and count the data.

Step 4) Make visuals if relevant.

Step 1: Type in

	Responsen	
1	Not enough salary	s
2	The headteacher doesn't support me.	h
3	I would like to be consulted.	p
4	With the money I get I cannot survive.	s
5	Policies are imposed.	p
6	The headteacher doesn't organise CPD	h
7	Salary.	s

Step 2: Define themes

Themes	Codes
Salary	s
Headteacher	h
Participation	p

Step 3: Count

Statistics	
Frequency	
Salary	3
Headteacher	2
Participation	2
Total	7

Step 3: Get %

Proportion	
Salary	43%
Headteacher	29%
Participation	29%
Total	100%

Why do you feel demotivated?

43%

29%

29%

■ Salary   ■ Headteacher   ■ Participation

Step 4:
Make a graph

PSPP is an open source gratis software that can help you visualise your data. It is similar to the very costly SPSS and you can even use some of the SPSS tutorials to set up your data set with PSPP.

It can be downloaded here : *https:// www.gnu.org/software/pspp/tour. html#visualisation*.

And the manual is accessible here: *https://www.gnu.org/software/pspp/ manual/*.

2: Visualise your data

The next step is then to visualise and analyse your data. This is an important step as the graphs will have an impact on how the readers will interpret the results. On the following webpage you can find useful information and templates on how to generate some of the tables listed below: *https://zapier.com/learn/ultimate-guide-to-forms-and-surveys/design-analyze-survey/#analyze*

To start with you can prepare graphs and frequency tables that visualise the number of responses in numbers and percentages. For ordinal data (Q3), bar charts with a common base line are a good way to visualise the results.

Some examples:

Bar charts

Pie chart

Bar chart (common base line)
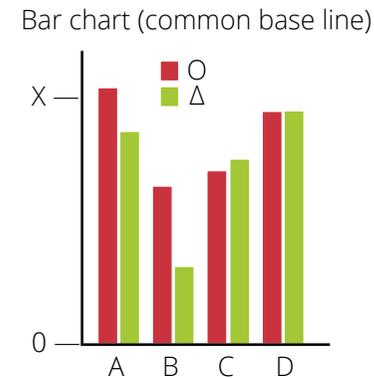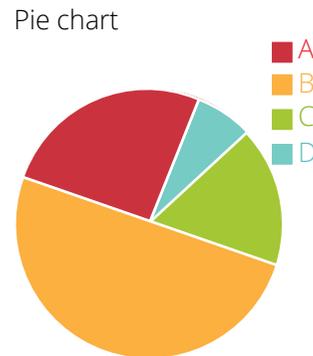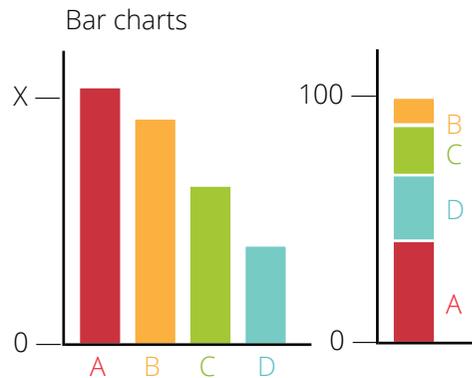
Frequency table

salary	3	43%
headteacher	2	29%
participation	2	29%
TOTAL	7	100%

The data tables and graphs as generated in the examples above are based on the entire group of survey respondents. However, depending on the objectives of your study you might want to find out how the answers of female or male teachers/ more experienced or less experienced teachers differ. After categorising your data (e.g., experience, gender) you can for instance prepare a contingency table (cross-tabulation).

Example:

Why do you feel demotivated?	Male teachers	Female teachers	Total
Salary	2 29%	1 14%	3 43%
Headteacher	1 14,5%	1 14,5%	2 29%
Participation	2 29%	0 0%	2 29%
TOTAL	**5 71,5%**	**2 28,5%**	**7 100%**

3: Interpret survey results

There are many complex statistical calculations that can be run in order to interpreted the numerical survey results. If you are using one of the online-survey service providers you will find more explanations on their webpages also for excel you can find information online. Here are a few more general things to consider:

1) **Focus on considerably big differences and high-points and remember that some error exists with every method**. Hence, if one person gave a very different answer, this could also mean that he/she made a mistake.

2) **Be careful with generalisations** as most of the time you will probably not have asked enough people to represent the entire population (i.e. all primary school teachers in Ghana).

Reflexivity/positionality in data analysis

Reflexivity is just as important during data analysis as data gathering. Be aware of how your conclusions are influenced by your identity as well as the data. Be critical of your own analysis, and exercise serious doubt about your own conclusions. Ask, is this really what should be concluded from the data or is it a conclusion I am projecting onto the data? You can also simply check your interpretations with your interviewee, your colleagues and/ or an outsider to see whether you have misinterpreted something.

6.3 Reliability and validity

Quantitative and qualitative research must be done systematically and transparently, not in an ad hoc manner. The quality of a research project rests on its ability to describe and explain a phenomena in a trustworthy manner that is rigorous, defensible. Triangulation can also help to strengthen the quality of the findings. This means that a research question is analysed from multiple perspectives, showing consistency across the data. It is important to **be transparent about how you have chosen your research participants**, **how many have taken part in your study** as well as **how you have gathered and analysed the data**.

Correlation vs. Causation

Often, research commissioned by unions focuses on member opinions. In which case, the research can only come up with correlational conclusions. This does not negate the validity of the research, but it is important to be aware that claims of causation cannot be made.

Correlation:

This is when one variable correlates with another. For example, a survey done with union members might show that there is a strong correlation between teachers who have a high sense of self-efficacy and those who participate in regular continuous professional development (CPD) sessions.

Causation:

This is when research shows that one variable causes another variable (for example, smoking causes cancer). The relationship between CPD and teacher self-efficacy is not causation because, although it is most likely, it is not necessarily the case that teachers with a strong sense of self-efficacy feel this way directly because of the CPD they have received. The sense of self-efficacy could have been caused by an entirely separate variable (for example excellent mentors or a supportive principal). It could also be the case that teachers who already have high self-efficacy are the ones who sign up to PLD sessions.

Causation can be proved by scientific controlled trials. However, it is now broadly accepted that qualitative research can also provide causal explanations through in-depth understandings of meanings, contexts and processes (for example, interviews with teachers, observation of PLD and teachers' practice and an exploration of other possible variables affecting self-efficacy could establish beyond reasonable doubt the conditions when, how and why regular PLD can cause a sense of high self-efficacy).

7 Research ethics

Ethics are a **crucial consideration in research**. You must choose your method to protect your sources and you should be transparent in your processes. This is especially important if your research is in a sensitive area. It is worthwhile discussing research ethics with your local university. They will have an ethics committee and established processes.

7.1 Informed consent

Depending on the context, consent can take different forms.

Written consent forms signed by participants are the most common. In this document you should include (as a minimum):

- An outline your research topic

- What is expected of the participant (e.g., hours of commitment etc.)

- Commitments that you, as the researcher make to them (e.g., anonymity, pledge to share research findings with participants etc.)

- An explanation that the participant can withdraw from the research at any time if it is their wish to do so

- Contact details of the researcher

- Contact details of someone else the participant can contact to discuss their rights as a participant

Oral consent is also possible if it is more contextually appropriate (for example if the participants are illiterate or if asking a participant to sign a document would make them distrust you).

Informed consent from parents or guardians is often legally necessary when dealing with minors. However, in relations to the Convention of the Rights of the Child (CRC), children should also have a right to choice in matters that concern them. Do not assume that the permission from a parent or guardian means that the child wants to be a research participant. Make sure the child themselves knows that they are able to withdraw from the research at any time if they want to. If dealing with young children, be aware of physical signs that might convey to you that they *do/do not* want to continue with the research.
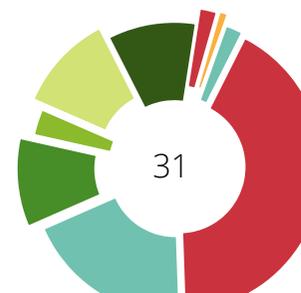
7.2 Anonymity

It is vital to think carefully about **how you can ensure the anonymity of the school/ participant involved in your research**. Even if the name of the school/participant is not given (pseudonyms are often used instead), the sample size needs to be large enough, or other details (not vital variables for the research) must also be omitted/ changed to ensure that the identity of the school/participant remains anonymous (see section on anonymity above).

Consider for example, **how much detail you are able to give about the school and its location without it being identifiable** (to a variety of audiences, even to those in the community). Be particularly careful if using photographs in your research. It may also be necessary to **change details about the participants**, such as age or gender - but only if these variables are not important for your findings. Consider whether ensuring **anonymity** *within* **the school context** might also be necessary. For instance, if some teachers are critical about the school management, make sure that you take a large enough sample of teachers' views so that these teachers cannot be identified by school leaders.

In some cases, schools/participants may have a strong desire to make their name public. This may be impossible if other participants in the same study want to remain anonymous. However, even if this is not the case, it may also be necessary to consider whether revealing research participants' identity could put them or others at risk.

7.3 Do no harm

Good research should never be at the expense of researcher or participants' safety. Think about the danger that could face your participants or the harm that could be done (including psychological) to your participant as a result of your research. Recognise the fact that participation in your research could be a disturbance or disruption to your participants' everyday lives. Think about the impact your research may have on a teacher's career for example.

7.4 Participation

Where appropriate, research can be done in conjunction with participants. This ensures that the research is not simply about extracting information from research participants, but is also shaped by them. Participants might take part in developing the research design itself, be consulted about the appropriateness of the theoretical framework, or give feedback on research findings as they emerge.
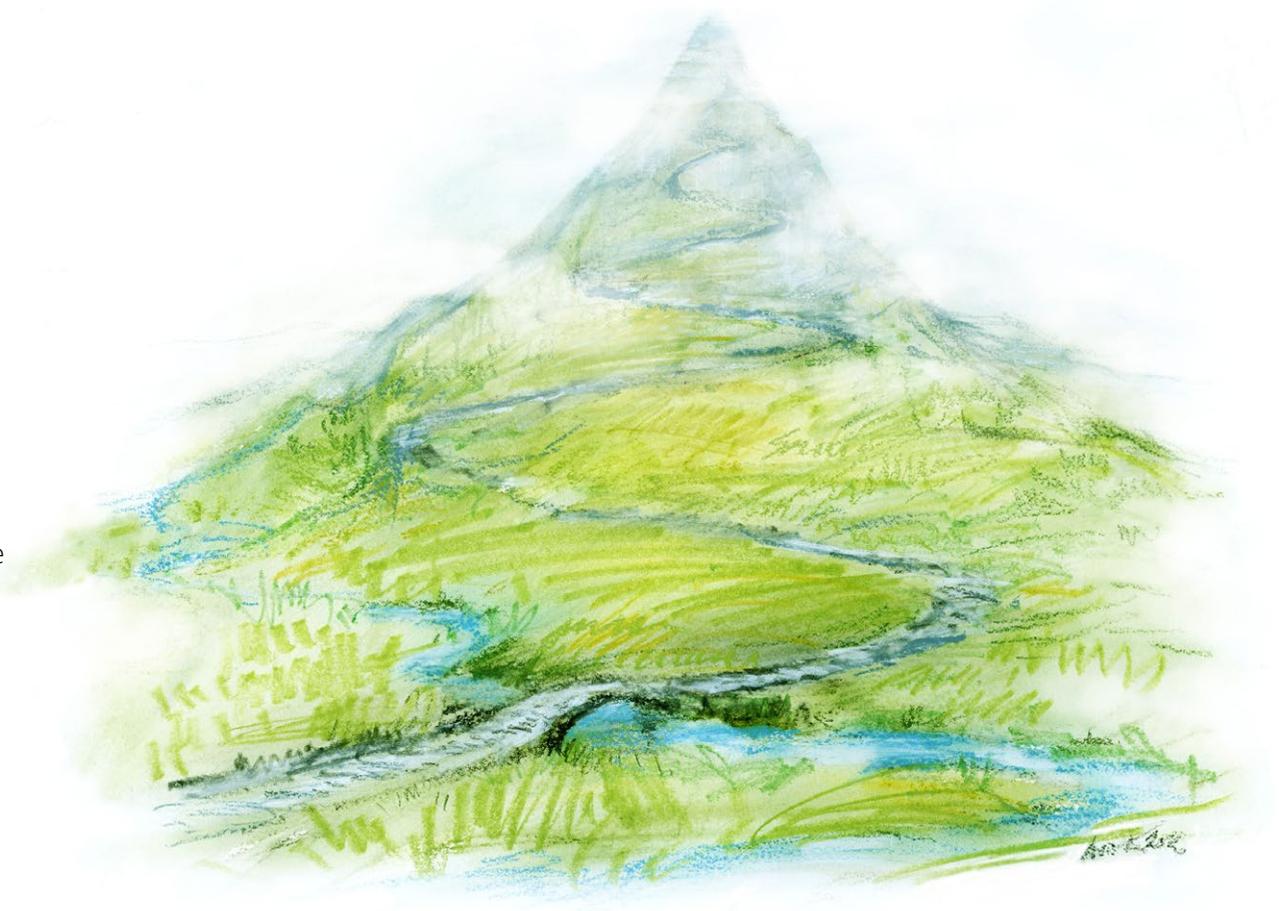
8 Writing reports

This chapter should provide you some guidance on what should be part of a research report and which things should be at least briefly considered in concept notes.

8.1 Different chapters

For the table of content, the following things should be considered:

- Clarity, easy to follow the logic

- Number your titles/sections: 1, 1.1, 1.2,...

- For longer papers it is easier to use an automatic table of content

  - Microsoft Word: *http://guides.lib.umich.edu/c.php?g=283073&p=1886010*
  - Open Office (a gratis programme to write documents with): *http://www.openoffice.org/documentation/HOW_TO/word_processing/HowTo_Create_and_Maintain_a_TOC.pdf*

1) Introduction

"State your thesis and the purpose of your research paper clearly. What is the chief reason you are writing the paper? State also how you plan to approach your topic. Is this a factual report, a book review, a comparison, or an analysis of a problem? Explain briefly the major points you plan to cover in your paper and why readers should be interested in your topic." *http://www.aresearchguide.com/1steps.html*

- It inspires, gives the map, guidance, introduction

- The purpose and aims of the research

- Research questions

- Your position

2) Literature review/Theoretical Framework (see chapter 4)

- Situate your research within existing/similar research on your topic

- Background information about the country specific context of your research topic

- Main concepts (e.g., privatisation of education, working conditions)

3) Problem statement and Research questions

- Problem statement: Why is it important to research on your chosen topic?

- Research questions: Which questions do you ask to solve the problem or contribute to a better understanding of it?

4) Methodological framework

- The research process, sampling, data and data collection methods
- Research schedule and the way it was done
- Description of the analysis
- Transparency

⮑ **Which data can help you to answer the research question? If so, why are you looking at different types of data?**

For example: *This study uses quantitative/ qualitative data because ...*

Teacher questionnaires / classroom observation/ government documents /... help to ....

It is important to also use/ do ... because ...

⮑ **How do you collect the data?**

For example: *Field observation*
➔ observation sheet, focus on a limited number of things that you want to observe

Questionnaire
➔ printout/online

⮑ **How do you analyse the data?**

For example: *List the tools for analysis, coding, data triangulation*

5) Research Findings

Here you document the main findings of your study. This section should be as neutral as possible and more descriptive. You should lay out the graphs alongside the explanation so the reader can see what is going on. Use a key where appropriate and make sure everything is obvious to someone coming to the report without prior knowledge.

- Structure, present and justify the results well
- Examples, extracts, tables, drawings
- What is new?

6) Discussion

This is the more interpretive part of your analysis where you can go deeper into the findings. This is the place where you set the foundation for the advocacy work you will do later. You will point out what the survey data means and will develop your thesis.

- Combine with larger discussions (e.g., increasing privatisation of education, working conditions of teachers)
- Discuss the results/findings on a deeper level – consequences

7) Summary and Conclusion

Here you summarise your research and the main conclusions and can include suggestions for future research.

8.2 Citation

- References are marked in brackets inside the text. Do not use footnotes!

- Detailed instructions for in-text citation are available at *www.apastyle.org* (see the APA Publication Manual, Chapter 6. Crediting Sources).

- Please note: Different from APA, page numbers should be used in all referencing, not only in direct quotations.

- The reference in brackets needs to include the name of the author, year of publication and the page(s) where the text can be found, e.g. (Kolb 1984, 27).

- Your reference should be equivalent to your bibliography.

- If there are less than five or five authors for a source, all the authors are mentioned.

- If there are six or more authors, all the authors are mentioned for the first time. After that the first author is mentioned and others are replaced by et al.

- If the same source is cited several times in a row, source can be marked as (ibid.).

- Tables/figures

This video might be helpful for you: *https://www.youtube.com/watch?v=t8zLsmIoFhc*

8.3 Appendices

- In the *Research Findings* sections you should provide only examples of your data set that support your argument. Hence, in the appendices/annex section you can list your entire data set.

8.4 Additional support

1) Here you can get some examples of how to write a good research paper and they provide helpful checklists: _http://www.aresearchguide.com/1steps.html_

2) On this page (see link below) you can find more helpful information about different sections of your research: Methods, Results, Difference between Results and Discussion, Conclusion, etc.

   _http://www.ldeo.columbia.edu/~martins/sen_sem/thesis_org.html_

3) And here are links to different pages that provide more information on how to write good paragraphs in a scientific paper:

   http://www.monash.edu.au/lls/llonline/writing/general/academic/4.1.xml

   _https://www.umuc.edu/writingcenter/writingresources/paragraph_struc.cfm_

   https://thesistips.wordpress.com/2012/02/05/say-what-the-heck-is-a-paragraph-anyway/

☑ **CHECKLIST ONE:**

1. Is my thesis statement concise and clear?
2. Did I follow my outline? Did I miss anything?
3. Are my arguments presented in a logical sequence?
4. Are all sources properly cited to ensure that I am not plagiarizing?
5. Have I proved my thesis with strong supporting arguments?
6. Have I made my intentions and points clear in the essay?

Re-read your paper for grammatical errors. Use a dictionary or a thesaurus as needed. Do a spell check. Correct all errors that you can spot and improve the overall quality of the paper to the best of your ability. Get someone else to read it over. Sometimes a second pair of eyes can see mistakes that you missed.

Source: _www.aresearchguide.com_

☑ **CHECKLIST TWO:**

1. Did I begin each paragraph with a proper topic sentence?
2. Have I supported my arguments with documented proof or examples?
3. Any run-on or unfinished sentences?
4. Any unnecessary or repetitious words?
5. Varying lengths of sentences?
6. Does one paragraph or idea flow smoothly into the next?
7. Any spelling or grammatical errors?
8. Quotes accurate in source, spelling, and punctuation?
9. Are all my citations accurate and in correct format?
10. Did I avoid using contractions? Use "cannot" instead of "can't", "do not" instead of "don't"?
11. Did I use third person as much as possible? Avoid using phrases such as "I think", "I guess", "I suppose"
12. Have I made my points clear and interesting but remained objective?
13. Did I leave a sense of completion for my reader(s) at the end of the paper?

Source: _www.aresearchguide.com_

9 Communications strategy

Communicating your research in an impactful way is much like creating a memorable meal for invited guests. It begins with an intention to match the menu to the guests and then to assembling the ingredients and executing a plan – or a 'recipe' – to combine the ingredients successfully.

Communications also begins with an understanding of who you want to 'consume' the information; who can best benefit from and further communicate the information you are providing.

So perform an inventory in your Communications Kitchen! But instead of spices and spatulas, list all the methods of communications that are available to you, from the simplest to the most complicated. Facebook, Twitter and the social media specific to your locale, of course. But what about SMS? MMS? Can you make and send a short video?

Get or make a list of all the television and radio stations in your area and all the newspapers. Don't forget news and blog websites. Can you borrow a list from someone? Maybe even a list with names and contact information. Don't forget national and international. If there is a news or information outlet that you follow and you think there is a chance

they might be interested, include them on your list. Think big!

But start small and smart. Studies have shown that the most effective and credible form of communications is "word-of-mouth," so your first audiences are those closest to you who can be reached by conversation and personal communications and in turn, can spread the information among their own personal contacts.

That's your 'Who' ingredients in communications. Now, 'What'?

Successful communications begin with Message. You are likely very proud of the detailed information and statistics in your research product, but few others have the time or interest to gain this level of understanding. So, imagine you are having a casual conversation and have 30 seconds to explain what this research is and why it matters. That 30 seconds – and perhaps even a 15-second version – is your Message. And your Message is the critical and constant ingredient of every communication, from a telephone call with a friend to an interview on national television.

Write it down, edit it, share it with others in your project, memorise it, use it as

the foundation of every communication, beginning with a one-page maximum length release. Primarily used for news outlets, the release is sent and followed within 24 hours by a call or visit to the outlet, offering a critical final item of the communications menu – personality.

Your research is paper or digital type on a screen. But effective communication in the news media requires the human touch, the person willing, able and empowered to represent the work as the face and voice in interviews, seminars, appearances, quotes and that critical interview with the BBC. Go for it!

How to effectively use research to support advocacy and campaigns? An example from Education International (EI)
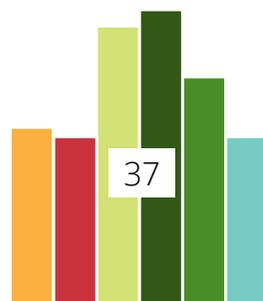
In 2015, *The resolution 1.1 on privatisation in and of education* received unanimous support at EI's World Congress, giving way to the Global Response to the commercialisation of education.

EI's Global Response seeks to harness the collective energy and influence of the union movement to advocate against the expansion of profit-making in education, specifically, where it threatens the universal right to free quality education, undermines the working conditions and rights of education workers and erodes democratic decision-making and public accountability in relation to education governance. It provides the opportunity for coordinated solidarity action within and across countries and globally.

One of the key areas of work is *for-profit school models* promoted by education corporations who seek to make a profit from the sale of private education services in the Global South while exploiting teachers and families, and whose expansion of activities often go unchecked by States.

In this respect, recent research for the Global Response includes the report *Schooling the Poor Profitably: the Innovations and Deprivations of Bridge International Academies (BIA)* in Uganda by Curtis Riep and Mark Machacek. The report uncovers how Bridges 'low-fee' for-profit private schools are undermining the accessibility of quality education in Uganda.

The research was used to support advocacy in the following way. The launch was organised on 5th October 2016, to coincide with a significant public and political event on the agenda of EI's member organisation UNATU; i.e. World Teacher's Day. The event brought together 3500 teachers and other distinguished guests and politicians including the President of Uganda and the Minister of Education.

The findings of the report were explicitly converted into key demands in the form of a joint statement by EI, UNATU, sister union organisations and civil society organisations. The statement was read at the launch event by UNATU's leadership. This was followed by an EI representative presenting the findings of the report to the President and Minister of Education, highlighting the extent to which the education provided by Bridge in Uganda disregards the legal and educational standards established by the Government.

Prior to the launch event, UNATU organized an extremely well attended press conference where a communications package (key findings, press release and a copy of the report) was distributed to journalists.

The report was publicised on twitter Facebook, the EI website and through newsletters, mailing lists. National and international media were contacted about the launch. Various academics were invited to write opinion pieces on the topic of the research. The reportwill be followed up with the release of additional research on the same topic in another context - the threat that Bridgeposes to quality education in Kenya.

The inclusion of a public/media event as part of the research-based advocacy strategy is crucial. Whilst not always easy to achieve in the absence of an obvious hook, insisting on a public/media event is important for the following reasons: Firstly, it takes the discussion/debate outside the four walls of closed meetings into the public domain; Secondly, it contributes to capacity building and thirdly, it deepens alliances and builds unity around a common purpose. The public / media events also allow to generate international solidarity through traditional and social media.

**STUDENTS
BEFORE PROFIT**

A NNEX 1

This is an example of a sheet that was handed out to research assistants as part of a research on working conditions in private schools. It reminded the assistants what to consider before they visit the schools, while they are there and what to do afterwards.

Preparation:

Each school that will be visited can be assigned a number (e.g., 1, 2, 3).

Research assistants could already gather some information about the school before they communicate with the Headteacher(s) and visit the school(s).

Communication with schools where data collection will be carried out:

Explain the purpose of the study, requests for brief interview with headmaster about the background on the school & distribution of questionnaire to 3 teachers (will take 20 minutes to complete). Let them know that the study is a confidential one – the school and teachers will not be identified.

Setting up a day/time and asking that the teachers who will be surveyed be notified in advance.

Confirmation of plans to visit the school two days beforehand (to make sure that the date still works for the school and they will be ready for you). Confirm time to arrive and meet with the Headteacher.

Arrival:

Brief interview with the Headteacher. [Training should review what questions to ask the Headteacher, and what other information should be collected for the Contact Sheet before and during the visit]

[If the interview goes well and you have established a good rapport, you could ask for permission to take photos of the school.]

Organise distribution and collection of completed surveys from teachers while on site. Be sure to check that the surveys have been completely filled out before leaving the site.

After visit:

Complete the contact sheet, including any observations you may have on the school, the visit as a whole, etc.

Write identification codes on each of the filled out surveys, including the school code first, a hyphen, and then a number for the survey (e.g., 1 – 1, would be the first questionnaire for school 1, 1-2 would be the second questionnaire for school 2, etc.).

Call in to your research supervisor to let him/her know how the visit went, if any issues arose in terms of gaining access to people, and if the surveys appear to be completed properly. Any problems (e.g., questions in the questionnaire were not clear) should be shared so that they can be solved. If your research supervisor thinks that these are problems that may occur with other researchers, he/she can relay "solutions" when he/she next speaks with researchers or through a general e-mail.

Other considerations:

During the training, review with researchers possible "problematic" scenarios and how to address them in the field, including reluctant or resistant Headteachers/teachers, lack of time, late arrival at school, etc. Brainstorm with researchers what might go wrong and come up with protocols together.

The word file is available at: *https://download.ei-ie.org/Docs/ WebDepot/ResearchToolkit_request_for_ proposals_1.docx*

Research project title: [add title]

Statement of purpose:

Add why the planned research is significant in general and more specific for the education community and what you would like to achieve with it (e.g., close a research/information gap for an under-researched topic, give voice to the education profession, challenge existing research/perceptions/knowledge, establish a strong evidence base for advocacy).

Specific research aims:

Add what the research should look at in detail (e.g., sentences like: Identify what...; Compare ...; Critically examine...; Describe...; Analyse).

Scope and scale of the work:

The research should focus on the topics mentioned in the research aims above. The research project will be a ... [add e.g., desk study, field research] that takes into consideration ... [add e.g., if this should be a national study or take into consideration specific regions or perspectives from specific groups of people].

Deliverables/Outcomes:

- Add what products or additional support you expect from the research (e.g., how long shall the final report be what should the interim report look like).

- Do you want the researcher to write a blogpost/news items or give an interview for the radio?

- Will he/she need to present the research somewhere?

- Do you expect the researcher to cooperate with another person in your union e.g., a teacher/researcher?

Background information on [name of your union]

Provide pro forma information about your union.

Policies on [state the theme of your research project]

State whether this research project is part of a bigger campaign and what you are planning to do with this research if it meets the established criteria (e.g., advocacy work, public launch).

Year: [add year]

Policy/campaign documents

- [if available add links or add documents as an Annex]

Terms of contract:

The contract should run for [add months/ years]. The contractor will liaise with an [add name or your union] contact person on the progress of the research. The research will remain confidential to [add name or your union] and the contractor until its publication.

Budget: [add the amount available]

Schedule of payments:

- 33 % on receipt of a concept note and signed contract

- 33% on receipt of the interim report

- 33% on receipt of the final report [add how many pages you are expecting]

Proposal Preparation

We would like researchers interested in the project to submit [add number of words e.g., 2000] words in English to explain the research approach, methodology, activities and budget [take budget out in case you have a fixed

budget available] by [add date] to [add name and email address/ fax number/ mail address]

Evaluation Process

Proposals will be considered by [add name or department] and the successful candidate will be informed by [add date].

Checklist for the concept note:
[adapt to your own study]

- Include conceptual framework

- Methodology quantitative and/or qualitative

- Number of sites covered

- Approximate number of surveys and interviews

- Dates for milestone reports

- Project plan/timeframe

- Budget breakdown

- [add those aims that are most important to you and maybe special in your specific context (e.g., language diversity, equal representation)]

The word file is available at: https://download.ei-ie.org/Docs/WebDepot/ResearchToolkit_request_for_proposals_1.docx

From research to advocacy

A guide to planning, conducting and disseminating research effectively

Illustration: Maggy Destrée 2016

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