

Racialized Discourses, Advocacy and Participatory Research:
Epistemological and Methodological Issues

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Abstract

This paper focuses on the benefits of advocacy and participatory research, exploring how tenets of this research can be applied to racialized discourses, that is, discourses that discuss a racialized and minoritized 'Other'. I argue that marginalized voices are often missing from the analysis process(es) of qualitative research and thus employing an advocacy and participatory lens is vital to understanding the knowledge claims of those individuals who have, and who continue to be, silenced in educational research. I further argue that advocacy and participatory research has the ability to create new forms of knowledge while allowing those involved the opportunity to have their knowledge claims recognized. This article is a call to researchers working with such marginalized groups to utilize an advocacy and participatory research approach.

Introduction

The novice researcher faces many options conducting an inquiry, both quantitative and qualitative, when entering the world of academic research. In the case of qualitative research, many avenues of inquiry are available. In this article I address the nature of advocacy and participatory research, with a particular focus on racialized discourses. Advocacy and participatory research encourages the active involvement of participants in the research process. Racialized discourses explore the socially constructed idea of race and those who are marginalized through racialization (Denzin & Lincoln, 2005). I argue that when conducting studies in the area of racialized discourses, with those who belong to a marginally racialized group, engaging in an advocacy and participatory approach is vital to understand the knowledge claims of those individuals who have, and who continue to be, side-lined in educational research. This paper also explores the challenges that currently face advocacy and participatory perspectives. I do not claim there is an essentialist way of belonging to this worldview; however, I posit that advocacy and participatory research provide the much-needed epistemologies and methodologies to begin a process of meaningful understanding of marginalized bodies within racialized discourses.

The Curious Case of Qualitative Research

Johnson and Christensen (2004) describe qualitative research as that which relies “primarily on a collection of qualitative data (non-numerical data such as words and pictures)” (p. 359; see also, Babbie & Benaquisto, 2002; Berg, 2007; Creswell, 2007; Denzin & Lincoln, 2005; Guba & Lincoln, 2005; McMillan, 2004; Schram, 2006). Bogdan and Biklen (1982) provide a summary of the elements they believe comprise qualitative research and highlight that “meaning is of essential concern to the qualitative approach” (p. 29). However, this begs the question, whose meaning? During the qualitative process there is much meaning put into participant responses by the author. The analytical process is often undertaken solely by one or more researchers. This process can fail to verify analyses with participants, leaving research findings and discussions limited to the interpretation of the author(s). Furthermore, there is no guarantee that the meaning the reader puts into the very same data will match the meaning of the author or the intended meaning of the participant. How does the reader gain a sense of authenticity of the data and, more importantly, what are the implications for the researcher-participant relationship when the latter may perceive the analysis of the data as inaccurate or misrepresentative of the meaning of the phenomenon in question? These are questions that must be explored during the research process, which includes design, implementation, analysis, and interpretation. Further, these questions must also be mindfully asked by academic audiences.

The gap of accuracy between what participants may actually mean versus how researchers may independently construct meaning from the data may create problems of accuracy or authenticity. Problems such as these lead back to the debates with research itself, a debate that Smith (1999) notes is “inextricably linked to European imperialism and colonialism” (p. 1). The issues Smith is referring to are the ways in which indigenous people have been misrepresented in the past in the name of research. He further claims that “the ways in which scientific research is implicated in the worst excesses of colonialism remains a powerful remembered history for many of the world’s colonized peoples” (Smith, 1999, p. 1). Denzin and Lincoln (2005) add that “qualitative research... serves as a metaphor for colonial knowledge, for power, and for truth” (p. 1). They claim that qualitative research itself has become a “dirty word” due to its nature of (re)producing knowledge and (mis)representing the foreign and exoticized “Other” (p. 1). They go on to assert that “from the very beginning, qualitative research was implicated in a racist project” (p. 2). In this context, one can infer that qualitative research, however intended, has been self-serving on the part of researchers. Lacking, has been a more thorough perspective or input from the researched (see Amin, 1989; Banton, 1987; Goldberg, 2002; Hannaford, 1996; Said, 1978, 2002; Young, 1992). Vidich and Lyman (2000) disagree suggesting that the aims of qualitative research have been an attempt to understand the ‘other’ not to exploit them. The debates surrounding the intentions of qualitative research give insight into how gaining access into a particular community for research purposes can be controversial.

Seeking permission to become an ‘insider’ comes with great responsibility. Will the data generated empower participants? Will it exploit an individual or group in question, and/or will it create an opening for

criticism and bias for readers? Focusing on empowerment by actively involving participants, while articulating the potential risks to participants, is imperative to conducting ethical research. In this context, the researcher must constantly ask him or herself: How should researchers handle data that may be perceived as negative to the participants or by the reader? If data from a certain community or racialized group perpetuates a stereotype, should researchers omit it from the findings? These are critical issues researchers must confront. I advocate that protecting your research participants should always be the number one priority in any research project. If one does come across data that may paint a negative picture, working with participants so that this data is treated in a delicate manner, is of utmost importance. One proposal is to explore sensitive data with participants and involve them in the analyses and interpretations by the researcher. In this way, participants are given an opportunity to deconstruct potential issues, and the researcher may present findings to readers as a more transparent account of participants' experiences, adding a compelling layer to the overall study.

Qualitative research provides researchers with useful methods to access and understand participants' "world, or reality, [that] is not the fixed, single, agreed upon, or measureable phenomenon that it is assumed to be in positivist, quantitative research" (Merriam, 2002, p. 3). It is not enough to assume that this method is a sufficient way of exploring the "multiple realities" of participants as referred to by Fraenkel and Wallen (2003, p. 16). As a researcher, I should not assume I can represent my participants objectively and accurately. Instead, I believe the core principles of advocacy and participatory research, which will be discussed below, should play a central role in qualitative studies.

With this backdrop, I endeavour to narrow this approach in relation to racialized discourses, a theoretical paradigm concerned primarily with exploring the socially constructed issues of race and the role of power as it surrounds racialized groups in society (Denzin & Lincoln, 2005). In my experience, I have found racialized groups who are also minoritized, to serve as participants who are written about but seldom have opportunities to have their voices heard. They continue to be silenced in empirical research and, thus, I argue there is a need to invite more researchers to adapt advocacy and participatory perspectives.

Advocacy and Participatory Research

Advocacy and participatory research can be considered as umbrella terms, which contain multiple perspectives that include: Action Research, Participatory Research, Reflective Practice-Based Research, and Participatory Action Research (PAR). The qualities and principles these perspectives share are similar. Depending on the usage of the term, most researchers are clear as to how the aspects of their advocacy and participatory research will function in a study. For the most part, the above theories advocate for researchers who collaborate with participants. In Participatory Action Research, participants and researchers are considered 'co-learners'. They each play an active role in identifying a problem, analyzing data, and working towards a solution, collaboratively (Elden, 1981); however, PAR researchers posit that researchers often fail to acknowledge there is *always* a power relation in place between the researcher and the researched (Jordan, 2014). This power relationship is not always questioned in Action Research. While participants may play an active role in the research and analysis process, it is often the researcher who develops the course of action. PAR sets itself apart as a theory by always questioning this hierarchy. Reflective Practice-Based Research is slightly distinct as it is concerned with highlighting the 'reflective' process that influences the action or the 'doing' part of participants' practice, and how the former can affect the latter (Schön, 1983). This type of research is popular in academia as educational professionals strive to improve their practice.

Throughout this paper, I refer to advocacy and participatory research as umbrella terms, which have accompanying perspectives, as outlined above. While the above-mentioned perspectives take on slightly different foci, the similarity they all share is the commitment to participant collaboration and action. I also identify other common elements that advocacy and participatory perspectives share, which I consider as essential components of this research paradigm.

The Roots of Advocacy and Participatory Research

Advocacy and participatory research became more prominent in the late 1970s and 1980s, and have since been used both epistemologically and methodologically worldwide. These fields have been greatly influenced by Brazilian educator Paulo Freire (1970), who, in his revolutionary work, *The Pedagogy of the Oppressed*, critiqued the student-teacher relationship where the former became the “depositor[y]” and the latter the “depositor.” In this context students are merely becoming “collectors or cataloguers” who eventually are “filed away through the lack of creativity, transformation, and knowledge” (p.46). Freire believed that “knowledge emerge[d] only through invention and re-invention, through the restless, impatient continuing, hopeful inquiry human beings pursue in the world, with the world, and with each other” (p. 46).

Inspired by Freire’s pedagogy, educational researchers participating in advocacy and participatory research sought new ways of ‘knowing’ and presenting knowledge. New paradigms emerged largely because “the postpositivists impose[d] structural laws and theories that [did] not fit marginalized individuals or groups and the constructivists [did] not go far enough in advocating for actions to help individuals” (Creswell, 2007, p. 21). Positivists relied on the rigid structures of science where observable phenomena were the only measure of ‘truth’ (Denzin & Lincoln, 2005). Denzin and Lincoln also state that postpositivists, rejecting this notion, believed many factors can influence the scientific process, and these should be considered while still in the pursuit of objectivity; but constructivism, on the other hand, accepted that there exists no single ‘truth’, rather, individuals have multiple and co-constructed realities. It was thought by some researchers that these older approaches did not go far enough in their advocacy for an action agenda, which addressed such issues as oppression, inequality, and empowerment, at least not in meaningful ways that gave participants agency (Tandon, 1981; Hall, 1975).

What Constitutes Advocacy and Participatory Research?

McIntyre (2008) points out “there is no fixed formula for designing, practicing, and implementing” research that falls under advocacy and participatory research, nor is there “one overriding theoretical frame” (p.2). She later adds, “No two PAR projects are the same. The activities, methods, participants, objectives, and collection techniques are all particular to the context in which the project takes place” (p. 49). While McIntyre is making specific reference to Participatory Action Research, I stipulate the same to hold true for all forms of advocacy and participatory research. The collaborative nature of this paradigm addresses a myriad of topics that researchers and participants explore in equally diverse ways. This means that no two research projects will utilize the same methods nor produce the same outcomes.

The use of advocacy and participatory research is appealing to researchers, because it is possible to use a process and framework that best suits the needs of participants as opposed to tools that are solely convenient or familiar to the researcher. Although there may be no definitive way to conduct advocacy and participatory research, there are necessary components that comprise this approach to research and include: dialogue and participation, emancipation, action orientation, reflection and reflexivity. The following section looks at these core principles more closely.

Dialogue and Participation

Two essential and interrelated components of advocacy and participatory research are dialogue and participation. Berg (2007) notes the importance of the “active engagement of individuals, traditionally known as subjects, as *participants* and contributors in the research enterprise” (p. 223, emphasis added). Stringer (2004) defines the meaning of participants or ‘participation’ as not simply wanting to change the behaviours of others but “people changing their own practices and behaviors” (p. 5). By doing so, Stringer elaborates, “people develop high degrees of motivation and are often empowered to act in ways that they never thought possible” (p.31). This empowerment highlights the role of advocacy within advocacy and participatory research. Furthermore, the importance of participation, as noted by Kemmis and Wilkinson (1998), is that it “engages people in examining their knowledge...and interpretive categories” and provides a process whereby “each individual in a group tries to get a handle on the ways their knowledge shapes their sense of identity and agency” (p. 23). McIntyre (2003) adds that it is necessary to “listen to the

participants *so as to learn from them*” (p. 9, emphasis in original) thus valuing the knowledge claims of the participants involved. Participation and dialogue, which ultimately lead to a sense of agency, are two of the key factors of advocacy and participatory research that strive to provide opportunities for the voices of groups, who have been previously marginalized in educational research, to be heard.

Emancipation

Emancipation involves unleashing individuals from the epistemologies that characterize their existence and giving value to participants’ own knowledge claims. Emancipation also allows for “the democratization of knowledge production and use” (Berg, 2007, p. 224; see also, Stringer, 2004). Creswell (2007) posits that research is emancipatory in nature when “it helps unshackle people from the constraints of irrational and unjust structures that limit self-development and self-determination” (p. 22). This resonates with the work of Kemmis and Wilkinson (1998) who also suggest participatory research strives to challenge social equities and redistribute power.

Tyson (2003) notes deeper implications behind emancipatory aspects of advocacy and participatory research. She asserts that racialized ‘White’ epistemologies permeate institutions and have historically ignored the epistemologies of non-Whites. She states, “if liberation achieved by individuals at the expense of others is an act of oppression, then, educational research achieved by individuals at the expense of others is also an act of oppression” (p. 23). Tyson is making explicit reference to the way qualitative data in educational research has been, and continues to be, collected by participants while research is communicated through the researcher’s voice. Furthermore, recognition is often given solely to the principal researchers while participants largely remain invisible. Tyson calls out to researchers to value the importance of emancipation in research stating, “emancipatory research facilitates radical thought; radical thought supports radical action, and radical action can advance a transformative social agenda” (p. 25-26).

Advocacy and Participatory Research as Action-Oriented

Another crucial aspect of using advocacy and participatory research is that they are action-oriented. Defined as perspectives committed to “transform[ing] knowledge and practices in ways that improve the lives of marginalized [individuals]” (Rodriguez & Brown, 2009, p. 30) an action-oriented approach does not end at reporting research findings. The researcher and the participant continue to work collaboratively to pursue participant agency. Gaventa (1988) posits that using participatory research is “seen not only as a process of creating knowledge, but simultaneously, as education and development of consciousness, and of mobilization for action” (p. 19). It is vital for the researcher and participant, through collaboration and emancipation, to work together for proactive change.

Reflection and Reflexivity

Finally, reflection is another necessary aspect of advocacy and participatory research. Not only is it a critical element to address for the initiating researcher, but the individuals who are participating must also take a reflexive stance. Kemmis and Wilkinson (1998) use the term “reflexive” stating, “it aims to help people to investigate reality in order to change it, and to change reality in order to investigate it” (p. 24). In reference to action research they add that individuals who engage in such research need to change “their practices through a spiral of cycles of critical and self-critical action and reflection” (p. 24). Creswell (2007) describes the part of reflection as “recursive or dialectical” and as having capacity for change in itself (p. 23). The dialectical process that Creswell refers to is an ongoing dialogue, both internal and external, that constantly negotiates the challenges and tensions facing the group in question. These processes of critical reflection allow researchers and co-researchers to appreciate and make meaning out of their research experiences and look to action.

Upon learning the basic tenets of advocacy and participatory research, the question remains, how is this approach particularly useful when dealing with racialized discourses? The next section of the paper examines racialized discourses and how advocacy and participatory research can be an essential part of unpacking these discourses.

Racialized Discourses

Racialized discourses is a theoretical paradigm or perspective, which explores issues that impact racialized groups (Denzin & Lincoln, 2005). Drawing on the work of Stuart Hall on cultural studies and representation (1997), I define racialized discourses to go one step further as those discourses that interrogate the racialized oppression of marginalized groups in society, including how race intersects with social constructs such as class, gender, and sexuality. Bringing race to the forefront of discussions around marginalized bodies is as Dei (1996) describes it, a political choice. Pillow (2003) notes that “race-based methodologies arise because existing theoretical models and methodological discussions are insufficient to explain the complexity of racialized histories, lives, and communities” (p. 186). Although Pillow is referring to methodologies in this statement, I believe there is a fine line between race-based methodologies and race-based epistemologies. When it comes to advocacy and participatory research, the way of collecting and treating data (the methodology) in collaboration with participants, is the very basis of the research itself; that is, that knowledge claims are valid and meaningful when participants are given an opportunity to share their voice, which is acknowledged as their truth (epistemology).

One of the problems, however, is the limited utilization of advocacy and participatory research when dealing with racialized discourses. Many studies explore issues facing marginalized groups and use interpretive frameworks to analyze data (see Bhavnani & Davis, 2000; Hatcher & Troyna, 1993; Henry & Tator, 2002; Lewis, 2003; Rezai-Rashti, 2005). Examples of frameworks used for studies include critical race theory (Taylor, Gilborn & Ladson-Billings, 2009), critical multiculturalism (May, 1999), and anti-racism (Dei, 1996). Critical Race Theory (CRT) explores the role of race and racism as inherent parts of the legal system (Ladson-Billing & Tate IV, 2006). CRT also seeks to identify how institutionalized power structures marginalize certain communities and its members, as well as the pervasiveness of White privilege and White supremacy. Critical Multiculturalism has core features that predominantly examine the role of ‘Othering’ and the constructs of Whiteness and White privilege (McClaren, 1994; Nylund, 2006). Anti-racism focuses on an action plan to address and eliminate forms of racism, like the previous two mentioned, acknowledging that racism is primarily about power and privilege, which are systemic and institutional in society. Dei and Calliste (2000) describe anti-racism as a “strategy for institutional and systemic changes that addresses the issues of racism and the interlocking systems of oppression” (p. 13). I find these perspectives positive but somewhat problematic. While researchers using such frameworks try to create spaces for previously ignored voices, they are still silencing them by interpreting their words and making decisions independently regarding what to ask and how to disseminate findings. What these studies lack are the integral aspects of the active and participatory research as outlined above.

Tyson (2003) notes “the experience of racism and oppression moves the oppressed “Other” into a paradigm of survival creating a view of the world that is not shared by those gatekeepers who legitimize academic research” (p. 21). Tyson suggests that marginalized groups, particularly racialized groups, have knowledge claims that are distinct and under-represented and deserve to be shared. Ladson-Billing and Donnor (2005) note that “what each of these groups...has in common is the experience of a racialized identity” (p. 284). They go on to assert “the dominant ideology of the Euro-American epistemology has forced them into an essentialized and totalized unit that is perceived to have little or no internal variation” (p. 284). This statement recognizes that within these perspectives it is problematic to assume there are static images of racialized groups. As noted above, my interpretation of racialized discourses intersects with other facets of society, which includes class, gender, and sexuality.

Discussion about research and racialized discourses can lead to debates about who can and should conduct studies that include race and its variations. If the argument appears to be that academia suffers from “epistemological racism” (Pillows, 2003, p. 190), whereby political choices have been made to favour and promote certain epistemologies, then it could also be inferred that individuals behind such choices, and those who identify with these individuals, are unable to conduct research that deals with recognizing “Other” epistemologies. This is controversial and well beyond the scope of this paper to address in detail. While there are those that argue only researchers who identify with the marginalized group in question are able to conduct such studies (Rhodes, 1994; Wilson, 1974; Zinn, 1979), others argue it is problematic to assume “racial matching” (Twine, 2000, p.6) is the only way to adequately access marginalized groups (Essed, 1994; Wilson, 1974). While being an ‘insider’ may have many advantages, it is limiting to assume

that only researchers who identify with the marginalized group in question can produce valuable research. This mentality, as Rhodes (1994) notes, “risks promoting the very marginalization and devaluation... which it seeks to redress” (p. 557).

An example of specific communities utilizing advocacy and participatory research is illustrated through the growing body of PAR research in Latino/a/Chicana studies (Cammarota & Romero, 2009; Sanchez, 2009). These studies utilize the core principles of advocacy and participatory research, as outlined earlier, to engage students in critical consciousness and raise participants’ ability to analyse their own social contexts. Utilizing advocacy and participatory perspectives in research benefits the participants, the researcher, and those in the surrounding community. Not only does the action-oriented aspect have the potential to benefit those involved in each project, but so too does the knowledge and the ideas that result from this kind of research that represents “images and stories that are usually ignored, dismissed, and overlooked” (McIntyre, 2008, p. 30). The success of participatory research should not be measured by reaching a conclusion or by following the “steps faithfully” (Kemmis & Wilkinson, 1998, p. 21), but rather judged by “whether [participants] have a strong and authentic sense of development and evolution” (p. 21). Further, Stringer (2004) claims that all stakeholders whose lives are affected by an issue need to be incorporated in the search for solutions to that issue thereby making success measureable by bring[ing] people together in a dialogic and productive relationship. This in turn creates a sense of community through the sharing of perspectives, the negotiation of meaning, and the development of collaboratively produced activities, programs and projects (p.33).

Cooper (2005) summarizes the goal of utilizing advocacy and participatory perspectives in research accurately when she says, “While some gains are measureable, who can put a value on the opportunity to work for something you believe in?” (p. 474). However, this is not to say that advocacy and participatory research is free of challenges and ethical complexities. Each should be assessed from the very beginning when considering research through the adoption of advocacy and participatory research, until the end. Some important considerations include “relationship building, addressing research questions, and deciding who will participate, who will speak for whom, who ‘owns’ the data generated... what actions will be taken, and how information will be disseminated to outsiders” (McIntyre, 2008, p.11). Essentially this means giving transparent roles to researchers and participants throughout the research process, including the dissemination phase. This will ultimately benefit participants and provide them clarity regarding their role in the research process. Nolen and Putten (2007) raise a complicated issue that traditional research methods may not face, that is, “the extent to which participants can give truly informed consent, when the nature of the proposed change is unknown and will be determined by an emerging research protocol” (p. 402). Nolen and Putten bring rightful awareness to the critical issue of protecting participants from short and long-term negative consequences. These are all challenges that need to be considered carefully, worked through thoughtfully using critical self-reflection, and by engaging in authentic dialogue with participants.

Conclusion

The use of advocacy and participatory research has the potential to accomplish and address many of the limitations of traditional qualitative research that involve participants from a range of social groups. By incorporating the four core principles of advocacy and participatory research: participation, action-orientation, emancipation, and reflection/reflexivity, this approach provides important tools to address the marginalized voices within racialized discourses in educational research. This type of research approach not only has the ability to create new forms of knowledge, but also allows those involved the opportunity to have their knowledge and truths recognized and valued. In the words of Foucault (1988), “I believe too much in truth not to suppose that there are different truths and different ways of speaking the truth” (p. 51). Advocacy and participatory research engenders transformative methodologies and epistemologies, which can be particularly powerful when working within racialized discourses to provide opportunities for agency to those who have been previously under-represented in qualitative research.

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