

Guide to good practice for inclusive research in global development

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Published:

April 2022

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Foreword

This guide is intended primarily as a resource to help researchers in the global North consider how to organise and conduct research with global South partners, from the conception of ideas to the delivery of impact and outputs, in order to uphold as well as promote and champion the principles of equality, diversity and inclusion. The guide reflects a range of different hierarchies and power relations, including between global South and global North, East and West, and hierarchies within academia. Hierarchies between global South and global North are a particular focus of this document because of the remit of the Interdisciplinary Global Development Centre (IGDC) and the fact that many suitable funders will require international North/South partnerships. IGDC is committed to promoting equality, diversity and inclusion in all its activities, and all research undertaken by IGDC members should be underpinned by these principles.

Using this Guide

This guide is structured as a set of recommendations to researchers, highlighting key points to be considered in their research activities. However, it should not be considered as comprehensive. Researchers are bound to conduct their research in accordance with the policies of their own institution. This guide is also not intended to be prescriptive, but to encourage researchers to be proactive in considering how to make their research more inclusive.

The guide is split into several sections to cover all stages of research:

1. Conceptualising the research project
2. Establishing the project team
3. Developing research methodology
4. Conducting field work
5. Producing outputs
6. Generating impact

Citing this Document

This work should be cited as:

Altink, A., de Jong, S., Gascoigne, J., Grugel, J., Mazumdar, P., Omukuti, J., Roy, I. and White, P. (2022) "Guide to good practice for inclusive research in global development". [IGDC Working Papers & Briefings](#) - Working Paper No.1, Interdisciplinary Global Development Centre, University of York.

<https://www.york.ac.uk/media/igdc/papers/IGDC%20Guide%20to%20Inclusive%20Research.pdf>

1. Conceptualising the research project

It is important to consider inclusivity right from the outset of a research project:

- Involve global South partners from the start as equal partners. Consider whether there are opportunities to work with South-led organisations as research partners, as opposed to those based in the South but led by or managed from the North.
- Consider working with 'less-known' global South partners as well as the well-established and better-known ones.
- Work with global South partners to co-create the project so that it truly meets local needs.
- Reflect together with your global South partners on the most appropriate theoretical and analytical frameworks to be used in the project.
- Establish a diverse group of people for the initial project discussions, including diversity of gender, race, citizenship, stage of career etc.
- Involve Early Career Researchers (ECRs) in the project team from the outset. When working to involve ECRs, remember that there may be a gate-keeping culture within global South research institutions (as also can be the case in global North institutions), e.g. senior researchers in global South institutions are likely to be older men, and this may affect the choice of ECRs and their proposed role in the team.
- Be aware of intra-state inequalities and barriers to representation e.g. the effects of regionalism and ethnicity in the choice of research partners and the research team.
- Explore specific opportunities offered by the project to fund global South partners directly or via your research institution.
- Identify opportunities for global South partners to lead parts of the work, anticipate capacity and skills gaps and incorporate addressing them into the project proposals.
- Think carefully about who will benefit from the research and how those benefits are articulated and delivered.
- Carefully phrase research questions to incorporate an awareness of diversity and a commitment to equality and inclusion. Will answering the questions contribute to a more just society for all?
- Discuss branding guidelines and expectations at the outset of the project so that the contribution of all partners is visible.
- Commit to a transparent and participatory decision-making process e.g. budget allocation, salaries, travel costs, other direct costs.
- Identify any opportunities for distribution of resources among project partners, so that more marginalised partners benefit and exploitation is avoided.
- Discuss what ownership of the research, its benefits and products generated means for each partner, so these can be embedded into the project.
- Provide opportunities for non-academic partners to engage actively in the design and conduct of the research, as well as in outreach and dissemination.
- Funding applications often involve online submission processes, which may appear unfamiliar and complicated to partners outside the country in which the funding body is based. South-based partners involved in the submission process may require additional support for successful submission on their part. Allow some extra time to cover for those induction processes well in advance of the deadline, including registration on certain databases as required.

2. Establishing the project team

The make-up of the research team is a major step to ensuring a project is carried out in an inclusive way:

- Think carefully about the balance of the team and the roles within it (gender, regional/ethnic diversity, age, career stage etc.)
- Carefully consider the phrasing of job adverts for research positions/administrators on the project. Advertise on different platforms - LinkedIn, WhatsApp, Twitter, email contacts - to catch a wide audience. When shortlisting, consider the makeup of the shortlist in terms of gender, race, locality etc. Think about some of the likely issues that will prevent minorities from responding to job adverts/taking the position and consider how to address them e.g. will the position require a visa? Will persons from a specific region find it challenging to attend the interviews?
- Make team meetings inclusive. If you have global South partners, use virtual technology with all team members logging on separately rather than having all staff from a single global North institution in one room, to ensure equality of opportunity to contribute, and adopt technology to share minutes, draft papers etc. that are accessible to all. You should also consider differences in time zones, weekly holidays or other non-working days as observed in the partnering institutions.
- If you hold in-person meetings, take into account accessibility in relation to transport links, visas, costs and carbon footprint, and consult with global South partners before deciding on a location.
- The level of expectations of different team members should be clearly discussed and agreed from the start of the work. People from different cultures may vary in terms of work culture and may not assume responsibilities in a similar way. Clear agreement on the responsibilities, deliverables and processes at all points of the work, including proposal development and the research itself, can help to achieve shared goals and targets in a timely manner.
- Offer extra training and/or financial support for ECRs, including in the global South, and provide the opportunity to gain both research and project management skills to enhance their career development, and consider opportunities for them to gain experience of leadership roles during the project.
- Be aware that cultures may affect how individuals interact in professional settings. Adopt a culturally positive approach to project team meetings, using a range of approaches, e.g. smaller break-outs, post-its, anonymous suggestions, so that all individuals have an opportunity to express their views.
- If your grant has a conference or training budget, where possible ensure that it is available to global South partners.
- Take positive action to challenge power hierarchies - gender, age, race/ethnicity etc. - in establishing the project team and identifying specific roles – Principal Investigator, Co-Investigator, Work Package leaders etc.
- Performance evaluation indicators should be fair. They should encompass the full breadth of activities and outcomes of the project and not be biased in favour of strengths of teams from the global North.

3. Developing research methodology

To ensure the research itself takes an inclusive approach, the following factors should be considered when developing methodologies:

- Unless the funder requires ethics approval in advance of the proposal, make sure you obtain ethics approval as soon as funding has been secured. Develop ethics applications closely with partners, so partners have the opportunity to participate in an equitable way in those processes.
- Processes for ethics approval in some countries may be lengthy and time-consuming and involve significant processing costs. Ensure that you are familiar with the country's ethics approval processes at the funding-application stage, so you can include adequate time for this in the project planning.
- Make sure data collection includes different groups and does not just rely on elites, unless that is the focus of the project. Remember that the global South is not homogeneous and be mindful of power hierarchies within different countries in the global South.
- Obtaining participants' consent for involvement in research activities (e.g. questionnaires, interviews) might involve different practical considerations in some cultures, and standard ways of collecting signatures on consent forms may not be appropriate. You should agree with South-based partners the best means to obtain consent, to arrive at a solution that meets critical standards while being sensitive to cultural context.
- Informing participants about the research topic or processes may require a simplified structure in specific contexts, matching with the appropriate cultural practices.
- Consider in conjunction with South-based partners the appropriate arrangements for rights of access to, and use of, data generated during the research by South-based researchers and communities involved in generating the data, and for archiving and access to data after the project finishes.
- Make sure that data collection is culturally-sensitive - e.g. in some cases it may be essential to have women-only focus groups, or to only interview local leaders.
- Appreciate the range of indigenous, local knowledges through e.g. ensuring local leadership within the research process and/or the use of participatory research methods.
- Be aware of biases in secondary data, e.g. only views of male leaders represented, or data generated by smaller NGOs less likely to be accessible on online databases.

4. Conducting field work

When planning and carrying out field work, remain mindful of whether it is progressing in an inclusive way:

- Offer payments/refreshments/transport for participation in focus groups/interviews. Partnering institutions and South-based collaborators belonging to specific settings are likely to be best placed to advise on the most appropriate arrangements.
- Select venues and time slots for focus groups, interviews and workshops that are accessible for all and which are not going to lead to bias in participation.
- If you do the fieldwork yourself, reflect on your own positionality both (a) before fieldwork begins and (b) throughout the project, so that the significant power inequalities that exist between researchers from the North and South and between other diverse groups can be anticipated and pre-addressed.
- Be aware that your clothing and other aspects of your physical appearance may hold significant importance across different cultures.
- Maximise the opportunities for involving global South partners in all stages of the work, including data collection, analysis, interpretation and writing up.
- Use local translators in multi-language countries to capture a wide range of views as interviews/focus groups conducted solely in English or another European language, or in the dominant local language, will limit the range of views.
- Adopt protocols that ensure the safety of local researchers, as well as those from the global North, doing the fieldwork and protect participants from harm. Establish formal contracts between institutions and researchers, and ensure that these contractual agreements have clauses about security of research assistants.
- Provide researchers, if needed, with training in local cultures. Researchers' safety issues aligned to the likely risks and threats should be included in part of the training.

5. Producing outputs

Once the research has been completed it is equally important to ensure the outputs are inclusive:

- Be inclusive in authorship and adhere to Committee on Publication Ethics (COPE) guidelines on authorship.
- Use gender-neutral language in outputs.
- Ensure that global South partners are included in developing and authoring outputs, and have the opportunity to lead on publications. Planning for publications in the English language might require further support mechanisms to be put in place to assist lead-authorship by partners with a first language other than English.
- Offer opportunities for ECRs to be lead authors.
- Properly acknowledge all contributors including translators, local assistants, and external organisations that provided data etc.
- Publish in journals that adhere to good ethical standards in publishing and that provide full open access journals as far as possible, so that the publication can be read widely in the global South.
- In publications and reports, reflect on what knowledge and understanding learned from the global South can be applied to the global North.

- Consider publishing outputs in journals that have a larger global South audience or are managed from the global South.
- Support the publication of work in the languages of fieldwork countries, and support translations of English-language outputs in the languages spoken in fieldwork countries.

6. Generating impact

To ensure maximum benefit is gained from the research:

- Discuss the types of outputs from the research with South-based partners, and select formats to share your research findings that can have impact locally, e.g. policy brief, infographics, short videos that can be shared on WhatsApp.
- Create opportunities for global South partners to present the outputs of the work to promote global South visibility, e.g. at conferences.
- Consider outputs that will give back to the community where you have done your research. Exploring appropriate ways and means for dissemination in the community is important to expand the reach of your dissemination.
- Ensure that any promotion material of the project reflects the diversity of the team.
- Work with in-country organisations as far as possible in relation to engagement and outreach activities.
- Maximise the accessibility of publicity materials, including consideration of language and literacy levels in the target populations.

Further reading

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