Methodological challenges in researching activism in action: civil society engagement towards health for all

Chiara Bodini, Fran Baum, Ronald Labonté, David Legge, David Sanders & Amit Sengupta

Taylor & Francis
Taylor & Francis Group

Check for updates

RESEARCH PAPER

Methodological challenges in researching activism in action: civil society engagement towards health for all

Chiara Bodini [a,b], Fran Baum [c], Ronald Labonté [d], David Legge [e], David Sanders [f] and Amit Sengupta[g]*

aCentre for International and Intercultural Health, Universita degli Studi di Bologna, Italy; bViva Salud, Brussels, Belgium; cSouthgate Institute for Health, Society and Equity, Flinders University, Adelaide, Australia; dEpidemiology and Community Medicine, University of Ottawa, Ottawa, Canada; eSchool of Public Health, La Trobe University, Melbourne, Australia; fSchool of Public Health, University of the Western Cape, Cape Town, South Africa; gPeople's Health Movement, Delhi, India

ABSTRACT

Civil society engagement around health care and population health improvement is an important driver towards Health for All. Research can improve the effectiveness of health activism by examining the resources, structures and strategies of civil society engagement. However, research to support such engagement faces epistemological and methodological challenges which call for specific research strategies.

A four year multi-country study was undertaken by the People's Health Movement, a global network working for health for all. The research took place in six countries (Brazil, Colombia, DR Congo, India, Italy, South Africa) and globally, and was directed to understanding five domains of civil society engagement: movement building; campaigning and advocacy; capacity building; knowledge generation, access and use; and engaging with governance. The research plan and methods of data collection and analysis were tailored to address the objective of improving activist practice, while negotiating research challenges identified during the design phase.

Results include insights into the practice of civil society engagement in relation to the five domains of activist practice, as well as experience gained in managing six methodological challenges which we describe as: making meaning, aligning research and action, managing power relations, valuing experiential knowledges, chaos and contingency, challenging preconceptions.

Researching activism can produce useful insights into practice as well as support continuous improvement in the effectiveness of such activism. However, there are significant methodological challenges that can be addressed through appropriate strategies. More research, building on the approach described in this paper, can contribute to more effective civil society activism for health.

Introduction

History indicates the importance of civil society engagement (CSE) in the achievement of institutional and social change locally, nationally and globally. Precedents include legal reform (e.g. abolition of

slavery (Hochschild, 2005)), institutional development (e.g. environmental protection (Rootes, 2004)), and cultural change (e.g. gender relations (Heather & Zeldes, 2008)). In health, local, regional and national social movements play a critical role in creating the conditions to achieve 'health for all' (HFA), including action on the social determinants of health and access to affordable, high quality health care (Heywood, 2009; World Health Organization [WHO], 1981).

We use the term *Health for All* to encapsulate the objectives of decent health care, environments which support population health, and health equity (WHO, 1981). We use the term *Health for All Movement* to refer to the individuals, organisations and networks in civil society (Della Porta & Diani, 2006) who are working towards Health for All and the closely related goal of primary health care, originally proposed in the 1978 Alma Ata Declaration (WHO and UNICEF, 1978), which includes commitment to citizen participation, action on social determinants of health across sectors and comprehensive promotive, preventive, curative and rehabilitative care. Our use of the term 'civil society' distinguishes a domain of social action which is separate from the state and the market. We use the term 'activist' to denote a person whose active engagement in the pursuit of social and political change arises from a personal and ethical commitment beyond the norms of profession and employment.

In our current post-1980 era of neoliberal globalisation, the social and political pathways towards HFA are increasingly determined through pressures, barriers and opportunities operating globally as well as nationally and locally (Labonté & Stuckler, 2016). A critical priority for the HFA movement is therefore to develop the capacity to act as a global social movement. There is only limited published research on how this kind of complementary action at different levels can impact governance structures (Kapilashrami & O'Brien, 2012; Krause, 2014; Loewenson, 2003; O'Brien et al., 2000). Research on the 'practice' of civil society engagement takes the form of individual case studies (Adriance, 1994; Barton, 2004; Biruk & Trapence, 2018; Caruso, 2016; Franklin, 2014; Paphitis, 2018; Robins, 2010), case study collections (Barlow & Clarke, 2001; Brecher et al., 2002; Choudry, 2013; Franklin, 2014; Suzuki & Lee, 2015; Warkentin, 2001), theoretical monographs (Buechler, 2000; Laverack, 2013), and edited collections (Maloney & Deth, 2010). There have been a few reports focusing on specific elements of practice (Gen & Wright, 2016; Zoller, 2005) or on movements addressing particular issues (Pianta, 2014) or populations (Smith, 1995).

From 2014 to 2018, as part of the People's Health Movement (PHM), a global network working for HFA, we undertook a large multi-center study in six countries (Brazil, Colombia, DR Congo, India, Italy, South Africa) and globally. The aim of our research was to better understand five domains of civil society engagement (CSE) around health (movement building; campaigning and advocacy; capacity building; knowledge generation, access and use; and engaging with governance), with the goal of improving our activist practice.

Activist purpose, strategy, and experience are framed within the world view of the individual activists and the cultures of which we/they are part. Accordingly, our evaluation of activists' experience, and the lessons to be drawn therefrom needed to be framed within the world view of those activists. This approach, which places a premium on the subjectivity of the activists rather than the objectivity of the researchers, raised epistemological and methodological challenges in the context of developing our research plan.

(1) Making meaning: If research is to produce knowledge which can be incorporated into activist practice, it needs to be meaningful in terms of the existing world view of the activist. The challenge is to position the activists as the subjects (or agents) of the research which involves an epistemological shift from seeking objectivist truth to creating knowledge which will be useful in practice (Barnett, 2000).

(2) Aligning research and action: The research design needed to ensure that obligations arising from research participation should not compromise the activist agenda. The possible loss of commitment to the research because of the pressures of ongoing activism is a necessary contingency.

(3) Managing power relations: In participatory action research (PAR) avoiding undue power imbalances depends on a degree of reflexivity on the part of the researchers (Aggett, 2018) and an explicit recognition, in the culture of the project, that the risk exists and that all parties have a responsibility to work together to manage it. This is made easier when solidarity exists between the researchers and the activists and there is a commitment to mutual learning. The conditions for building such solidarity and commitment where activists are facing political repression is one of the challenges being addressed in this research.

(4) Valuing experiential, including embodied, knowledges: The activists whose practice is being researched are neither blank slates nor empty vessels. Part of the research task is the 'systematisation' of activists' experiences (Herout & Schmid, 2015; Jara H, 1994; Luger & Massing, 2015); sharing, reflecting, reordering, and then reworking the narrative of setting and strategy. In some degree the activists' existing knowledges have yet to be articulated in discourse; they are embodied but less clearly cognized (Ollis, 2010). Freire's 'conscientisation' (Freire, 1971) involves bringing into discursive form intuitive and experiential knowledges.

(5) Chaos and contingency: The environment of social movement activism is chaotic (the unpredictability of complex systems), uncontrollable (excluding use of randomisation and control groups), and contingent (the conjunction of people and circumstance is always unique). Causal inference and attribution are still central to the purposes of the research but they depend on the interpretation of the findings in relation to the prevailing (and emerging) narratives which guide activist practice.

(6) Challenging preconceptions: When data analysis is largely interpretive, and that interpretation is broadly framed by the narrative which informed the design of the research, there is a risk that inferences about what works (usefulness in practice) may reflect the assumptions of the original narrative. This can lead to ignoring clues in the data which point to new ways of making sense of context and practice. Managing this risk involves cultivating a culture of questioning among the activists/researchers and exposing research design, methods, and analysis to a range of different perspectives in a respectful but critical context.

These challenges were evident from the design stage of our research and negotiating them has informed the design, strategies and methods of our research.

Our purpose in this paper is twofold; first, to present an overview of the whole research project focusing on research design but including a summary of the project findings; and second, to report on how we approached the above six methodological challenges and to summarise our learnings in relation to these challenges.

Research setting and methods

The context: about PHM

The People's Health Movement (PHM) is a global network working towards HFA locally, nationally and globally; campaigning around specific issues; providing training; developing information resources; and engaging officials at multiple levels in policy dialogue[1]. Of particular significance are the 'country circles' and the global programmes, including the International People's Health University (short training for activists), Global Health Watch[2] (a periodic 'alternative World Health Report'), and WHO Watch[3] (systematic monitoring and advocacy around WHO governing body meetings and decision-making).

The political analysis and strategy of PHM in addressing the global health crisis is articulated clearly in the People's Charter for Health (People's Health Movement, 2000). As long standing activists within the PHM this analysis and strategy reflects our shared commitment.

Overview of the research

Between 2014 and 2018 PHM undertook a large multi-center study exploring CSE in the struggle for HFA. Around 130 researchers from 10 countries participated in the research, which involved case studies of activism in six countries (Brazil, Colombia, DR Congo, India, Italy, and South Africa), evaluations of three of PHM's global programmes, a review of activist narratives, a literature review of social movements in health, and an historical review of the HFA movement. The six countries were chosen after assessing the capacity of the local PHM circles to participate in the research, while trying to achieve a geographical balance. The research teams undertaking these different projects included a combination of senior activists/researchers and younger activists/researchers who were mentored by the former. Most participants in the research were active members of PHM.

The project has been managed globally by the authors of this paper working in consultation with the global Steering Council of PHM, and the relevant PHM country circles. Country teams were supported through mentoring while acknowledging their autonomy in adapting the research design to the local context. As well as local discussions within the project teams, six regional workshops and one global workshop were held to present and discuss the findings of the projects.

Ethical approval for the global research project was obtained through the Senate Research Committee of the University of the Western Cape, South Africa, which gave also approval for the activities in South Africa. Ethical clearance was also obtained in countries where different research activities were undertaken or led from.

Research design

The project was designed around the participatory action research (PAR) cycle (see Figure 1 below). PAR is a methodology based on systematic, collective, reflexive inquiry that researchers and participants undertake, so they (we) can understand and improve upon the practices in which they (we) participate and the situations in which they find themselves. Since PAR 'seeks to understand and improve the world by changing it' (Baum et al., 2006), it was the most appropriate method to achieve our aim to better understand five domains of CSE around HFA, with the goal of improving activist practice.
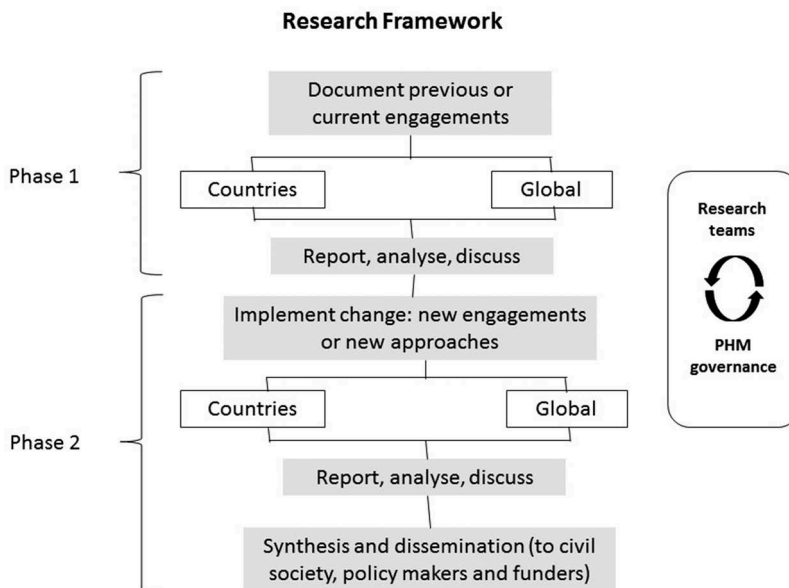

Figure 1. Phases of action research in the participating countries and at the global level.

During the first phase the various project groups (country and global) were asked to document and reflect upon actions and programmes seen as part of the *HFA movement* in their country or globally. At the end of Phase 1 the country and global teams came together to reflect on findings to date and to identify new ways of working (or new projects) which would implement the lessons of the first phase. During Phase 2 the country and global project teams implemented these new directions and again documented their strategies and outcomes.

Guidelines for country research teams, outlining the purposes, strategies and organisation of the research were developed. They were explicit that participation was to be a useful and integral part of the PHM country circles' action programmes, and that new knowledge would be generated by systematically learning from practice.

All of the various sub-studies (see below) were designed around particular objectives arising from specific contexts, and the reports of these studies include diverse conclusions around those objectives. However, the researchers were also asked to collect data and draw conclusions regarding five core domains:

- movement building
- campaigning and advocacy
- capacity building
- knowledge generation, access and use
- engaging with governance

These five domains correspond to the structures of PHM's strategic planning as it has emerged over several years. The domains also reflect extant literature on social movements but, more importantly, capture how PHM has approached its operations and development through a continuous process of critical self-reflection. Programme logic narratives were developed for each, through a process of iterative workshopping, with a view to guiding data collection and analysis.

Participating studies

The overall research included:

1. Case studies of HFA activism in six countries
(Brazil, Colombia, DR Congo, India, Italy, and South Africa). In four instances these case studies were framed in accordance with the action research spiral, composed of spirals of planning, action, reflection, and renewed action (Lewin, 1946/1948), with two cycles of action and research.

2. Formative evaluation of three of PHM's global programmes
(International People's Health University (IPHU), Global Health Watch, and WHO Watch). In all cases there were opportunities to implement changes arising from these evaluations in subsequent courses, Global Health Watch editions, and episodes of monitoring WHO governing body meetings. In addition, specific case studies were undertaken in El Salvador and Ghana to highlight local developments in relation to the IPHU and WHO Watch.

3. Review of activist narratives
With a view to tapping extended experience and assessment of HFA activism, 15 personal narratives from long standing activists within PHM were collected and analysed.

4. Desktop studies
A literature review of social movements in health and a historical review of the HFA movement globally were undertaken.

Analyses

Analyses were undertaken first, by the local research teams in the course of their research and reporting and second, by the central research team through workshops and writing the final report. Different analytic strategies were adopted for different components of the research. In the country-specific projects, the data were collected mainly through qualitative methodologies and the analysis was done collectively by PHM circles through inductive and interpretive synthesis. The formative evaluations of PHM's global programmes, involving both quantitative and qualitative data collection, were analysed in the course of narrative synthesis. The activist narratives were collected through semi-structured interviews and analysed thematically with interpretive synthesis. The desk research involved data collected through literature review and was analysed in the course of narrative synthesis.

The regional workshops provided opportunities for the country research teams to present their findings and discuss their conclusions. These were followed by several review and planning workshops at which the emerging findings from all of the different projects were reviewed and discussed. Consultative and interpretive synthesis led to the drafting of the final report, which focused on five domains of activist practice (above) and was informed by three broad principles:

Principles of practice

The form of knowledge produced is a collection of generalisations, or principles about CSE, to inform practitioners. Few of these principles are absolute in the sense of being universally applicable and none of them is sufficient, as a guide to activist practice, in themselves. All of them are contingent, in the sense of dependent upon context for relevance and application. Collectively these principles provide insights to be drawn upon by practitioners in accordance with their own circumstances and judgment.

Tethering

The principles were generated through a process of generalisation from quite specific circumstances. The relevance or reach of those principles depends on the generality of those circumstances. For principles to be useful they need to remain tethered to the case studies from which they were generalised, allowing knowledge users (other activists) to infer their transferable relevance to other contexts. Taken without regard to such tethering would lead to CSE principles so general in expression as to be useless in practice.

Usefulness in practice

The value of the generalisations produced in this research derives from their usefulness in particular practice settings and for particular purposes. Transferability of the study findings will be based upon critical reflection by potential users on the data and our synthesis, and the perceived utility of our findings in their/our ongoing practice.

Results

Insights from the country case studies, from the evaluation of PHM global programmes and from the activist narratives have led to the creation of a summary list of Activist Principles across the five domains of activist strategy that framed our research (see Table 1, below). Elaboration of these principles and reports on specific case studies are in the process of being finalised and written up for journal submission.[4]

In their case study reports, activist participants in the research project noted how the study design created opportunities for movement building and capacity development. This was especially so in the countries that completed the PAR cycles, where initial learnings informed the planning of new activities. Emerging research findings were also applied in the conduct of PHM's

Table 1. Knowledge about activist practice represented as 'principles'.

Movement building
- Attend to all levels of the movement: individuals, relationships, communities, organisations and networks;
- Understand the pathways to activism;
- Community building, including mutualism, is part of movement building;
- Collaborating with the State: a matter of judgment;
- Social movements have deep roots; know your history;
- Leadership is necessary but so is accountability;
- Build constructive links between the HFA movement and broader political movements;
- Convergence (including solidarity, networking and collaboration) is a key objective of movement building in the era of globalisation.

Campaigning and advocacy
- Campaign strategies bring together theories of change, forms of action and contingency;
- Networking for campaigning is empowering but requires investment and compromise;
- Need to balance policy advocacy with structural critique.

Capacity building
- Beyond individuals, think relationships, think organisation, think culture;
- Think of capacity building in relation to pathways to activism (understanding, hope, resilience);
- Build on informal learning opportunities as well as organizing formally structured training programmes;
- Link curriculum planning to practice opportunities;
- Bringing 'body knowledge' into discourse (through popular education and 'systematisation of experience') makes such knowledge available for sharing and building upon;
- Avoid expert domination: value trust, reciprocity and dignity.

Knowledge generation, access and use
- New information flows can be empowering, ranging from scientific, technical and legal knowledges, to indigenous knowledges which point towards new ways of understanding ourselves in the world;
- Producing the knowledges that the activists need is a core social movement strategy, including: academic research, research synthesis, learning from activist practice, bringing lived experience into discourse, and re-appropriating history, culture, identity;
- Knowledge sharing is a core social movement strategy, exemplified by Global Health Watch, but attention is needed to media, methods and language, and awareness that knowledge sharing is embedded in relations of solidarity and relations of power.

Engaging with governance
- Critical policy engagement by social movements at the national level deals with *both* national issues *and* issues which have international ramifications;
- There is also an important role for critical policy engagement by social movements directly at the global level (linked to complementary advocacy at the national level).

global programmes, including the ongoing organisation of WHO Watch, the fifth edition of Global Health Watch (published in late 2017), the planning of several IPHU short courses in 2017–18 and the development of an activist manual on movement building[5]. Strategic and programmatic discussions at PHM's Steering Council meetings in 2017–18 have been significantly informed by the emerging findings of the project. For instance, the results under the axis 'campaigning and advocacy' have led to a restructuring of PHM's HFA campaign, with a greater focus on specific issues and more strategic resource allocation.

The commitment of the research project to 'real time' relevance for HFA activism was furthered through its emphasis on enhancing activists' capacities in research and knowledge generation and dissemination. Capacity enhancement was a core objective of the project from conception, and it was made possible by the collaborative participation of both activist academics and social movement activists, building on established PHM partnerships. Young researchers were mentored by senior researchers for both the country and the global components of the study, and through country and regional workshops. In each of the country teams there were community activists who might not have identified as researchers but who were able to acquire new insights and skills through the training and mentorship that formed part of our study design. An *a priori* assumption of our study was that a fundamental prerequisite for embedding organisational learning within activist organisations is for the principles of PAR, the importance of individual and collective reflexivity, and the rigorous systematisation of experience, to be absorbed into the culture, structure, routines, and discourses of the organisation. Significant progress towards this end has

been achieved through the project: across PHM but also across the many different activist organisations which have engaged in the project.

Discussion: methodological challenges, strategies and learnings

We earlier presented six methodological challenges confronting this kind of research and pointed to some of the research strategies through which those challenges might be managed. In this section we return to these challenges, outline the strategies adopted to manage them and discuss the learnings generated in applying those strategies (summarised in Table 2).

The first of the identified challenges, **making meaning** was directly related to the structure of the project and to the research design; to ensure that the knowledge produced through the research would make sense within the activist world view so that it could be integrated into activist practice.

The second challenge identified concerned the **alignment of research and activist purpose**. The activists' research engagement should not compromise their activist agenda and accordingly the research purpose should be closely aligned with their activist agenda and the research obligations be clearly framed as learning how to do it better (Freire, 1982; Smith, 1995); 'investigating reality in order to transform it' (Fals Borda, 1979). The participatory action research (PAR) tradition provided a robust framework for this alignment (Kemmis & Wilkinson, 1998; Yoshihama, 2009).

In order to address these challenges, the research design was crafted around five domains – movement building, campaigning and advocacy, capacity building, knowledge generation, access and use, engaging with governance – corresponding to the structures of PHM's strategic planning developed over several years of its own practice reflection.

Furthermore, country research projects were to be designed in ways that would be a useful and integral part of the PHM country circles' action programmes, with all of the various sub-studies designed around particular objectives arising from context and program.

As expected, this generated significant diversity in approaches and some limitations in the coverage of the research themes and transferability. However, it also generated greater ownership of the results by country teams and positive developments in terms of movement building, especially in the countries that completed the PAR cycles.

Another two of the identified challenges pertain to the relational dimension of the research and to the type of knowledges being developed. We named these challenges '**managing power relations**' and '**valuing experiential (including embodied) knowledges**'. The first one derives from the fact that the researcher-activist relationship may enact the kinds of hierarchical power relations (e.g. across the axes of class, social status, academic knowledge or knowledge-as-power) that could reproduce the inequities that both parties are committed to addressing. The second one speaks to the different types of knowledge that can be generated through research and the politics (and power relations) that commonly represent some forms of knowledge as more relevant/ reliable/useful than others.

In order to explicitly recognize the risks of unequal power relations and highlight that all parties have a responsibility to work together to manage them, the values of respect, participation, solidarity and reflexivity were embedded in the culture of the project and promoted through project guidelines, mentoring, and dedicated sessions in the workshops.

Building on PHM's founding principles and established practices, the project strove to create settings where both participation and solidarity could be acknowledged, recognised, and strengthened. Building solidarity and co-producing a shared analysis can be time consuming and may not conform to the timelines of a funded research project. Neither solidarity nor agreement can be imposed. These strategies proved to be more effective where there was pre-existing awareness and a culture of participation, and where collective work was already part of the experience of the activist-researchers.

The project guidelines were explicit in terms of the goal of a 'systematisation' of activists' experiences: sharing, reflecting, reordering, and then reworking the narrative of setting and strategy. In some countries

Table 2. Managing the challenges of activist research.

Methodological challenges	Strategies	Learnings
Making meaning If research is to produce knowledge which can be integrated into activist practice it needs to be meaningful in terms of the world view of the activist.	The research design was crafted around the identified priorities of the participating collectives with mentoring from experienced researchers regarding data collection. The country projects were open-ended to accommodate changes in priorities, meanings, directions.	These strategies were effective in ensuring the knowledge produced was meaningful and useful for the activists. However, this approach yields significant diversity which limits the ability to generalise. Where research findings (or external factors) lead to changes in approach, the coherence of the research may be weakened.
Aligning research and action Obligations arising from the research should not compromise the activist agenda; need to accept the risk of reduced commitment to the research.	An alignment of research objectives and the activist agenda was encouraged throughout. The principle was reiterated in the project guidelines and through mentorship and workshopping.	This alignment was close in most settings and generated a strong sense of ownership. The alignment was closer where participation was greater and where the gap between researcher and activists was least.
Managing power relations It is a risk of this kind of participatory research that the researcher-activist relationship enacts the kinds of hierarchical power relations that may reproduce the wrongs and denials that both parties are committed to addressing.	Highlighting the principles of respect, participation, solidarity and reflexivity in the culture of the project through project guidelines, mentoring and workshops. The principles of respect, listening and solidarity were reinforced through the focus on learning from activists' experience.	Reflexivity, listening and participation require time, culture and personal skills that are not equally present in all settings. They work better where there is a pre-existing culture of participation and the research is conducted by a collective rather than a single researcher.
Valuing experiential, including embodied, knowledges The activists, whose practice is being researched, are not blank slates. In some degree the activists' existing knowledges have yet to be articulated in discourse; they are embodied but less clearly cognised.	An appreciation of the value of personal experience and embodied knowledges was emphasised in project guidelines and discussions. The application of Freirian 'conscientisation' was also encouraged.	Systematisation of activists' experience was adopted in all settings. Eliciting and working with embodied knowledges requires appreciation of such knowledges as well as skills in the relevant participatory practices.
Chaos and contingency The environment of social movement activism is uncontrollable and contingent. Causal inference and attribution depend on the interpretation of the findings in relation to the prevailing (and emerging) narratives which guide activist practice.	Data analysis at both country level and globally involved iterating between the data collected and the narrative of the activism. This called for clarity of shared narrative and rigor of analysis. These principles and practices were promoted and consciously implemented.	The narratives of activism may be different for different people. It is important to articulate them as part of an on-going process. Addressing this challenge depends on the clarify of and consensus around the narrative and the rigour through which the data are examined against it.
Challenging preconceptions When data analysis is largely interpretive, there is a risk that inferences about what works (usefulness in practice) may reflect the assumptions of the original narrative and overlook clues in the data which point to new ways of making sense of context and practice.	Critical reflexivity is necessary including space for scepticism but in a culture of security and solidarity. Project guidelines encouraged participatory examination of assumptions versus results, in non-hierarchical settings.	These principles were accepted across the project but they require time, experience, conceptual skills and secure spaces. These preconditions need to be cultivated.

(Italy, Colombia, Brazil) this principle was systematically implemented through approaches inspired by Freire's 'conscientisation'; bringing into discursive form intuitive and experiential (embodied) knowledges.

Finally, the last two challenges (**chaos and contingency** and **challenging preconceptions**) are related to the analysis and interpretation of data generated through the research design. Causal inference and attribution rely on the interpretation of the findings in relation to the prevailing (and emerging) narratives which guide activist practice. Such inference depends on critical reflection and discussion, including examination of outcomes which appear to confirm the narrative of practice as well as the assumptions underpinning that narrative. This research drew on Crotty's

(1998) account of the philosophical underpinnings of different approaches to interpretation in research and Garrick's (2000) discussion of interpretive research in relation to the subject position of the knower[6].

The imperative to maintain a high level of critical reflexivity to ensure integrity in our analysis has been realised, in part, because of the effort which has gone into participation, trust and solidarity. The research design, and methods of data collection and analysis were exposed to critical examination from a range of different perspectives, and a culture of questioning was nurtured among the activist/researchers. Through dedicated sessions in the workshops and one to one mentoring the practices of critical reflection and respectful engagement were strengthened.

In some cases (South Africa, Brazil), this process led to a clear change in the underlying narrative and brought the research, as well as the movement's action, towards new insights, practices and approaches. The existence of a collective space for analyzing and discussing the research assumptions and results proved to be strategic in keeping the generation of knowledge close to its point of use.

Conclusions

Civil society engagement around health care and population health improvement is an important driver towards Health for All. Accordingly improving the effectiveness of such health activism, cultivating organisational learning and continuous improvement, is critically important. Research can contribute to improving the effectiveness of health activism by examining the resources, structures, strategies and outcomes of civil society engagement.

In this paper we have described a large multicentre project directed to describing, understanding and enhancing the effectiveness of health activism at different levels and in different settings.

The substantive findings of the project, presented in this article in summary form only, point to the power of a fruitful collaboration between researchers and activists. The research design and style of implementation may provide a useful model for future projects involving such collaboration, as it articulates a methodological approach that is 'fit for purpose': improving the effectiveness of civil society health activism and supporting the development of organisational learning within activist organisations.

This paper has outlined the six epistemological and methodological challenges which were confronted in designing the project and reports on how these challenges were managed and the experience gained. The contribution of civil society engagement to achieving and defending HFA would be more powerful if more of those engaged in the HFA movement were able to study their practice and improve its effectiveness. With appropriate methodologies, such research will produce knowledges that can guide activists in addressing their own activist agendas, but which will have broader application and relevance.

The activist projects included in this study were based in different contexts and had their own specific purposes as well as meeting the objectives of the broader research project. The broad methodological framework described in this paper was not completely appropriate for every project and not uniformly applied in every context. However, the general approach was adopted in all projects and found to be practicable, useful, and acceptable. More research, building on the approach described in this paper, can contribute to more effective activism for health.

Notes

1. For more information about the history and practices of PHM, please visit https://phmovement.org/building-a-movement-for-health/.
2. See http://phmovement.org/global-health-watch/.
3. See http://phmovement.org/who-watch/.
4. A preliminary report providing more information on these case studies can be found in the Final Report submitted to our funders (IDRC) and publicly available at: www.phmovement.org/cse4hfa .
5. See http://phmovement.org/building-a-movement-for-health/.

6. See Patton (1990), pages 422–428, for a more general discussion of interpretation and synthesis. Garrick (2000) discusses interpretive analysis in relation to the subject whose knowing-in-practice is being reproduced. See Crotty (1998), pages 87–111, for a useful discussion of interpretivism as hermeneutics.

Disclosure statement

No potential conflict of interest was reported by the authors.

Funding

ORCID

Chiara Bodini 🆔 http://orcid.org/0000-0001-7629-2394
Fran Baum 🆔 http://orcid.org/0000-0002-2294-1368
Ronald Labonté 🆔 http://orcid.org/0000-0002-0615-740X
David Legge 🆔 http://orcid.org/0000-0002-4870-4520
David Sanders 🆔 http://orcid.org/0000-0003-1094-7655

References

Adriance, M. (1994). Base communities and rural mobilization in Northern Brazil. *Sociology of Religion*, *55*(2), 163–178. Retrieved from http://socrel.oxfordjournals.org/content/55/2/163.abstract

Aggett, S. (2018). Turning the gaze: Challenges of involving biomedical researchers in community engagement with research in Patan, Nepal. *Critical Public Health*, *28*(3), 5.

Barlow, M., & Clarke, T. (2001). *Global showdown: How the new activists are fighting global corporate rule*. Toronto: Stoddart.

Barnett, R. (2000). An adventure in 'postmodern' action research: Performativity, professionalism and power. In J. Garrick & C. Rhodes (Eds.), *Working knowledge* (pp. 15–31). London: Routledge.

Barton, C. (2004). Global women's movements at a crossroads: Seeking definition, new alliances and greater impact. *Socialism and Democracy Online*, *18*(1). Retrievedfrom http://sdonline.org/35/global-womens-movements-at-a-cross roads-seeking-definition-new-alliances-and-greater-impact/

Baum, F., MacDougall, C., & Smith, D. (2006). Participatory action research. *Journal of Epidemiology and Community Health*, *60*(10), 854–857.

Biruk, C., & Trapence, G. (2018). Community engagement in an economy of harms: Reflections from an LGBTI-rights NGO in Malawi. *Critical Public Health*, *28*(3), 340–351.

Brecher, J., Costello, T., & Smith, B. (2002). *Globalisation from below: The power of solidarity*. Cambridge, MA: South End Press.

Buechler, S. M. (2000). *Social movements in advanced capitalism: The political economy and cultural construction of social activism*. New York & Oxford: Oxford University Press.

Caruso, G. (2016). Open Cosmopolitanism and the world social forum: Global resistance, emancipation, and the activists' vision of a better world. *Globalizations*, 1–15. doi:10.1080/14747731.2016.1254413

Choudry, A. (2013). Cross-national comparisons of social movement unionism: Diversities of labour movement revitalization in Japan, Korea and the United States. [Book review]. *Labour/Le Travail*, (72), 406–408. Retrieved fromhttp://go.galegroup.com.ez.library.latrobe.edu.au/ps/i.do?id=GALE%7CA353438696&v=2.1&u=latrobe&it=r&p=EAIM&sw=w&asid=4715faf328b2a3df7f80a7159318c998

Crotty, M. (1998). *The foundations of social research: Meaning and perspective in the research process*. Sydney: Allen and Unwin.

Della Porta, D., & Diani, M. (2006). *Social movements: An introduction*. Malden, Oxford and Carlton: Blackwell Publishing.

Fals Borda, O. (1979). Investigating reality in order to transform it: The Colombian experience. *Dialectical Anthropology*, *4* March, 33–55.

Franklin, S. M. (2014). *After the rebellion: Black youth, social movement activism, and the post-civil rights generation*. NY: New York University Press.

Freire, P. (1971). *Pedagogy of the oppressed*. New York: Seaview.

Freire, P. (1982). Creating alternative research methods: Learning to do it by doing it. In B. Hall, A. Gillette, & R. Tandon (Eds.), *Creating knowledge: A monopoly?* (pp. 29–37). New Delhi: Society for Participatory Research in Asia.

Garrick, J. (2000). The construction of 'working knowledge' and (mis)interpretive research. In J. Garrick & C. Rhodes (Eds.), *Working knowledge* (pp. 203–216). London: Routledge.

Gen, S., & Wright, A. C. (2016). Strategies of policy advocacy organizations and their theoretical affinities: Evidence from Q-methodology. *Policy Studies Journal*, *46*(2). doi:10.1111/psj.12167

Heather, S., & Zeldes, K. (2008). "Write a chapter and change the world" how the boston women's health book collective transformed women's health then—and now. *American Journal of Public Health*, *98*(10), 1741–1745.

Herout, P., & Schmid, E. (2015). Doing, knowing, learning: Systematization of experiences based on the knowledge management of HORIZONT3000. *Knowledge Management for Development Journal*, *11*(1), 64–76. Retrieved from http://www.horizont3000.at/wp-content/uploads/2016/07/Doing-Knowing-Learning.pdf;http://journal.km4dev.org/

Heywood, M. (2009). South Africa's treatment action campaign: Combining law and social mobilization to realize the right to health. *Journal Human Rights Practice*, *1*(1), 14–36. Retrieved from http://jhrp.oxfordjournals.org/cgi/content/abstract/1/1/14

Hochschild, A. (2005). *Bury the chains: Prophets and rebels in the fight to free an empire's slaves*. New York: Houghton Miffin.

Jara, H. O. (1994). *Para sistematizar experiencias* [Systematizing experience]. San Jose: ALFORIA.

Kapilashrami, A., & O'Brien, O. (2012). The global fund and the re-configuration and re-emergence of 'civil society': Widening or closing the democratic deficit? *Global Public Health*, *7*(5), 437–451.

Kemmis, S., & Wilkinson, M. (1998). Participatory action research and the study of practice. In B. Atweh, S. Kemmis, & P. Weeks (Eds.), *Action research in practice: Partnerships for social justice in education* (pp. 21–36). London, New York: Routledge.

Krause, K. (2014). Transnational civil society activism and international security politics: From landmines to global zero. *Global Policy*, *5*(2), 229–234.

Labonté, R., & Stuckler, D. (2016). The rise of neoliberalism: How bad economics imperils health and what to do about it. *Journal of Epidemiology and Community Health*, *70*(3), 312–318.

Laverack, G. (2013). *Health activism: Foundations and strategies*. London: Sage.

Lewin, K. (1946/1948). Action research and minority problems. In G. W. Lewin (Ed.), *Resolving social conflicts* (pp. 201–216). New York: Harper & Row.

Loewenson, R. (2003). Civil society influence on global health policy: An annotated bibliography. Retrieved from http://www.tarsc.org/WHOCSI/home

Luger, A., & Massing, L. (2015). *Learning from our experience: A guide to participative sistematisation*. Vienna: HORIZONT3000.

Maloney, W. A., & Deth, J. W. V. (Eds.). (2010). *Civil society and activism in Europe: Contextualising engagement and political orientations*. New York: Routledge.

O'Brien, R., Goetz, A. M., Scholte, J. A., & Williams, M. (2000). *Contesting global governance: Multilateral economic institutions and global social movements*. Cambridge, NY, Melbourne, Madrid, Cape Town: Cambridge University Press.

Ollis, T. (2010). The pedagogy of activism: Learning to change the world. *The International Journal of Learning*, *17*(8), 239–249.

Paphitis, S. A. (2018). The possibility of addressing epistemic injustice through engaged research practice: Reflections on a menstruation related critical health education project in South Africa. *Critical Public Health*, *28*(3), 363–372.

Patton, M. Q. (1990). *Qualitative evaluation and research methods* (2nd ed.). Newbury Park, London, New Delhi: Sage Publications.

People's Health Movement. (2000). *The people's charter for health*. Savar, Bangladesh: PHM.

Pianta, M. (2014). Slowing trade: Global activism against trade liberalization. *Global Policy*, *5*(2), 214–221.

Robins, S. (2010). 'Long live zackie, long live': AIDS activism, science and citizenship after apartheid. *Journal of Southern African Studies*, *30*(3), 651–672.

Rootes, C. (2004). Environmental movements. In D. A. Snow, S. A. Soule, & H. Kriesi (Eds.), *The blackwell companion to social movements* (pp. 608–640). Malden, MA and Oxford: Blackwell.

Smith, S. L. (1995). *Sick and tired of being sick and tired: Black women's health activism in America, 1890–1950*. Philadelphia: University of Pennsylvania Press.

Suzuki, A., & Lee, B. (2015). Introduction to the special issue: A comparative perspective of union-CSO coalitions in the East Asian countries. *Development and Society*, *44*(2), 191–198.

Warkentin, C. (2001). *Reshaping world politics: NGOs, the internet, and global civil society Lanham*. Maryland: Rowman and Littlefield Publishers.

WHO. (1981). *Global strategy for health for all by the year 2000*. Geneva: World Health Organization.

WHO & UNICEF. (1978). Alma-Ata 1978. Geneva: Primary health care. Retrieved from http://www.who.int/publications/almaata_declaration_en.pdf?ua=1&ua=1

Yoshihama, M. (2009). "One unit of the past": Action research project on domestic violence in Japan. In J. Sudbury & M. Okazawa-Rey (Eds.), *Activist scholarship: Antiracism, feminism, and social change* (pp. 75–94). Oxford and New York: Routledge.

Zoller, H. M. (2005). Health activism: Communication theory and action for social change. *Communication Theory*, *15*(4), 341–364. Retrieved from http://www.stes-apes.med.ulg.ac.be/Documents_electroniques/MET/MET-COM/ELE%20MET-COM%20A-8200.pdf