



IGAD Center of  
Excellence for Preventing  
and Countering  
Violent Extremism

# Trust-Based, Qualitative Field Methods

## A Manual for Researchers of Violent Extremism

**Marc Sommers**

Foreword by Amb. Mahboub Maalim,  
IGAD Executive Secretary

“Undertaking research in a risky environment can be a daunting task. This manual gives us a glimpse of how to deploy qualitative research methods to manage and navigate around the intricacies involved. It makes good reading for researchers interested in the field of violent extremism.”

**BENEAH MUTSOTSO, PhD**

Senior Lecturer, Department of Sociology and Social Work, University of Nairobi

“This excellent manual reflects learning from decades of careful research with young people in turbulent settings. It combines deep knowledge and wisdom with sound practical advice. I recommend it highly not just to all those confronted by the many risks and challenges of researching violent extremism, but also those who work in development settings.”

**JO BOYDEN**

Professor of International Development, University of Oxford

***Why should anyone tell you the truth?*** All field research with human subjects must address this question. The challenge is particularly significant in areas where threatening groups—such as violent extremist organizations—are influential, and where surveillance is a concern.

The research approach detailed in this manual aims to address this challenge. It emphasizes the cultivation of trust, an appreciation of the impact of surveillance and power on local environments, inquiry with marginalized youth, a focus on understanding gender and class issues, and analysis of youth dynamics in contrasting locations.

While the intended audience is experienced researchers who examine issues of violent extremism in the IGAD region and elsewhere, the methods detailed in this manual can be adapted and used in development and conflict contexts, as well as for research featuring youth globally.

**MARC SOMMERS** served as Senior Research Advisor at the IGAD Center of Excellence for Preventing and Countering Violent Extremism in 2017 and 2018. He began conducting field research in conflict-affected areas of Africa in 1990. Dr. Sommers has written nine books and received four book awards. He also is the author of *Youth and the Field of Countering Violent Extremism* (Promundo-US).

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“By shining the spotlight on ‘trust’ adroitly, Marc Sommers effectively elevates the discourse regarding community-based approaches to countering violent extremism in fragile regions. This publication, which expounds upon the centrality of confidence-building and the necessity of engaging youth in meaningful approaches to countering violent extremism, fills crucial gaps for scholars, policy-makers, and general practitioners.”

**Raymond Gilpin** · Academic Dean, Africa Center for Strategic Studies, National Defense University, and former Economics Director at the United States Institute of Peace

“This manual is great. It helps the researcher develop a deep understanding with the people he/she is working with. The manual does not only work for researchers in the field of violent extremism. It is also very useful when conducting social research: trust is a critical element for anyone to tell you the truth. I have used the manual and it has been great!”

**Harriet Pamara** · Research Associate with Centre for Basic Research, Kampala, Uganda

“An eminently practical and wise field guide for research and outreach in dangerous and distressed places: into what makes people—mainly youth—susceptible to violent extremism, and how to pull them safely away. Collecting relevant evidence first requires learning to navigate the barriers and biases of elite officials to gain access to those most important yet most disempowered, especially female youth. Then comes the systemic work—spelled out with superb clarity—of gaining truth through trust, by empowering youth with recognition of their narratives and knowledge, which almost inevitably transforms one’s own prior conjectures into hypotheses more telling and real. A stellar field guide.”

**Scott Atran** · Emeritus Director of Anthropology, France’s National Center for Scientific Research, and Research Professor of Psychology and Public Policy, University of Michigan

“Marc Sommers, one of the foremost researchers on youth and violent conflict, provides an essential, ethical, and responsible guide for experienced researchers seeking to better understand the complexity of male and female youth in contexts affected by violent extremism. A superb guidebook.”

**Dyan Mazurana, PhD** · Associate Research Professor, Fletcher School of Law and Diplomacy and Research Director, Feinstein International Center, Tufts University

“I fully endorse the publication of the trust-based qualitative research manual by ICEPCVE. It is a handy tool for research in conflict-prone areas.”

**Stephen Hippo Twebaze** · Center for Basic Research, Kampala, Uganda

“Marc Sommers has written a timely and much-needed practical guide for researchers of violent extremism, for conducting high-quality, trust-based qualitative field research. The manual, written in an accessible and highly readable format, and with its novel approaches to both studying youth and contexts impacted by terrorism and violent extremism, will have something to offer research students and more experienced researchers alike. This manual will no doubt become an invaluable tool for building capacity amongst researchers in the field of preventing and countering violent extremism, but should also help stimulate researchers to apply greater rigor to their methods and ethics before venturing into the field.”

**Akil N. Awan, PhD** · Associate Professor of Modern History, Political Violence, and Terrorism, Royal Holloway, University of London

“There is an urgency to conduct research about violent extremism, but haste is not a virtue in this important endeavor. This field research guide distills some of the current techniques, methods, and approaches to cultivate trust and develop unique insights about violent extremist organizations in sub-Saharan Africa.”

**Judd Devermont** · Director, Africa Program, Center for Strategic and International Studies



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IGAD Executive Secretary

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PLEASE NOTE: Although a work of the U.S. Government, the views contained in this manual are those of the author, and do not necessarily represent the views of the U.S. Government, the Intergovernmental Authority on Development (IGAD), or any IGAD member state.

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# Contents

List of Abbreviations .....	ix
Overview .....	xi
Foreword by Ambassador (Eng.) Mahboub Maalim, <i>IGAD Executive Secretary</i> .....	xiii
The Manual and the IGAD Center of Excellence for Preventing and Countering Violent Extremism Simon Nyambura, <i>Director, IGAD Center of Excellence for Preventing and Countering Violent Extremism</i> .....	xv
Acknowledgments .....	xvii
<b>Part 1 Introduction</b>	
1.1 The purpose of this manual .....	1
1.2 Who should use this manual .....	3
1.3 How to use this manual .....	5
<b>Part 2 Context and Rationale</b>	
2.1 Introduction .....	7
2.2 Gaps in research on violent extremism: An overview .....	8
2.3 The view from the ground: A fresh look at local dynamics .....	13

2.4	Current methods for researching violent extremism: One assessment .....	17
2.5	Some observations of the research process .....	20

**Part 3 Trust-Based, Qualitative Methods**

3.1	Introduction .....	25
3.2	Trust-based research methods .....	26
3.3	Elements of trust-based, qualitative research .....	28
3.4	Snowball sampling .....	32
3.5	A preference for peer groups .....	35
3.6	The importance of reflexivity, curiosity, and humility .....	37
3.7	The significance of engagement with non-elites .....	38
3.8	The need to consider gender dynamics .....	41

**Part 4 Getting Started**

4.1	Introduction .....	43
4.2	Qualitative research: Some methodological concerns .....	43
4.3	Constructing your research: Getting the basics right .....	52

**Part 5 Preparations for the Field**

5.1	Introduction .....	57
5.2	Writing questionnaires .....	57
5.3	The need to secure voluntary consent— and manage expectations .....	63
5.4	Writing the profile form .....	67
5.5	Site selection and comparative analysis .....	70
5.6	Putting together your research team .....	71
5.7	Advance preparations for trust-based fieldwork .....	74



**Part 6 Methods in the Field**

6.1 Introduction..... 81  
6.2 Entering the field ..... 81  
6.3 Active observation..... 87  
6.4 Snowball sampling..... 89  
6.5 Establishing your sampling protocols..... 90  
6.6 Peer group and individual interviews ..... 91  
6.7 Interviewing youth: Issues to keep in mind..... 92  
6.8 Leading interview sessions ..... 94  
6.9 Corroborating evidence in  
the field (Triangulation)..... 97

**Part 7 Analysis and Write-Up**

7.1 Introduction..... 99  
7.2 Data analysis..... 99  
7.3 Writing the report ..... 103  
7.4 Final thoughts ..... 107

**References..... 109**

**About the Author ..... 115**

## **Boxes**

<b>Box 1</b>	Youth lives .....	14
<b>Box 2</b>	Core methods for researching violent extremism .....	18
<b>Box 3</b>	Field research: Challenges and pitfalls .....	20
<b>Box 4</b>	Recommended reading .....	22
<b>Box 5</b>	Elements of trust-based, qualitative research.....	29
<b>Box 6</b>	Snowball sampling: Strengths and weaknesses .....	33
<b>Box 7</b>	Working with focus groups .....	35
<b>Box 8</b>	Ensuring safety and confidentiality in your research.....	46
<b>Box 9</b>	Dealing with surveillance: A four-step process.....	50
<b>Box 10</b>	Constructing your research.....	55
<b>Box 11</b>	Strategies for interviews about violent extremism: A case study .....	60
<b>Box 12</b>	Voluntary consent script.....	65
<b>Box 13</b>	Profile information .....	68
<b>Box 14</b>	The role of the research translator.....	73
<b>Box 15</b>	Maintaining relations with government authorities: A case study .....	77
<b>Box 16</b>	Entering the field: A checklist.....	85
<b>Box 17</b>	Making observations in the field .....	88

# List of Abbreviations

CSO	Bureau of Conflict and Stabilization Operations at the U.S. Department of State
CVE	countering violent extremism
FG	focus group
FGD	focus group discussion
ICEPCVE	IGAD Center of Excellence for Preventing and Countering Violent Extremism
IGAD	Intergovernmental Authority on Development
ISIS	Islamic State of Iraq and al-Sham, the Islamic State of Iraq and Syria, or Daesh/Da'esh. Also known as ISIL, Islamic State in Iraq and the Levant
PVE	preventing violent extremism
P/CVE	preventing/countering violent extremism
USAID	United States Agency for International Development
USIP	United States Institute of Peace
VE	violent extremism
VEO	violent extremist organization



# Overview

*Why should anyone tell you the truth?* All field research with human subjects must address this question. The challenge is particularly significant in areas where threatening groups—such as violent extremist organizations—are influential, and where surveillance is a concern. It may be much safer for respondents to mislead researchers or conceal vital information.

The research approach detailed in this manual aims to address this challenge. It is a practical guide to conducting high-quality, trust-based, qualitative field research on violent extremism. The approach is adaptable for research in development and conflict-affected contexts, as well as research that features youth.

This manual is designed to introduce a new approach to researchers who already have been trained in research methods, protocols, and ethics. It will be of particular use for researchers with prior field experience with qualitative techniques, in contexts impacted by conflict or violent extremism (or both), and in interviewing non-elites.

Specifically, the manual aims to enhance the capacity of researchers from countries that are members of the Intergovernmental Authority on Development (IGAD) (plus Tanzania) who

focus on violent extremist organization (VEO) dynamics, countering violent extremism (CVE), and preventing violent extremism (PVE) concerns.

This approach is designed to help researchers of violent extremism address three major research gaps:

1. Understanding youth who are vulnerable to entering VEOs;
2. Local dynamics in areas where VEOs are influential; and
3. Why youth in certain areas enter VEOs while those living nearby do not (the “clustering” phenomenon).

The methods detailed in this manual account for the high degrees of sensitivity and risk that are prevalent in areas where violent extremism is a concern, and where CVE or PVE efforts have relevance. Collectively, they emphasize the cultivation of trust, inquiry with marginalized youth, a focus on understanding gender and class issues, an appreciation of the impact of surveillance and power on local environments, and analysis of youth dynamics in contrasting locations.

This manual supports IGAD’s strategic objective to “Generate and share research, knowledge, analysis, and information to better understand the drivers of violent extremism,” as detailed in its Regional Strategy for Preventing and Countering Violent Extremism.



**Ambassador (Eng.)  
Mahboub Maalim**  
Executive Secretary  
Intergovernmental Authority  
on Development (IGAD)

## Foreword

The commitment of the Intergovernmental Authority on Development (IGAD) to preventing and countering violent extremism has been long-standing, sustained, and substantial. On a global level, it supported the launch and implementation of the “whole of society” approach that was endorsed in the UN Secretary-General’s Plan of Action to Prevent Violent Extremism in January 2016. IGAD also has developed and begun to implement the Regional Strategy for Preventing and Countering Violent Extremism for the IGAD region. In addition, IGAD has established the IGAD Center of Excellence for Preventing and Countering Violent Extremism (ICEPCVE) in Djibouti.

Quality research that is evidence-based is necessary to help states and citizens of the IGAD region grasp and address the complex and pressing challenges that violent extremist organizations (VEOs) present. Significant knowledge gaps persist, both about the

actions and rationales of violent extremist organizations, and the most effective means for resisting and reversing the real and potential damage that VEOs create.

In response, the IGAD Regional Strategy stresses the role of research and analysis in deepening our understanding of the drivers of extremism and the sites of radicalization and recruitment. Among ICEPCVE's featured efforts is providing a dedicated platform for the creation and dissemination of high-quality research.

This manual supports IGAD's ongoing effort to prevent and counter violent extremism. I encourage researchers across the IGAD region, and globally, to draw on this new resource to advance investigation and knowledge about violent extremism, and ultimately diminish the appeal and impact of radical ideologies and messages across our world.

I sincerely thank Dr. Marc Sommers, the former Senior Research Advisor at the IGAD Center of Excellence for Preventing and Countering Violent Extremism, and the entire Center of Excellence team for the development of this manual. I also thank the U.S. Department of State, particularly the Bureau of Conflict and Stabilization Operations (CSO), for supporting the development of this manual.

AMBASSADOR (ENG.) MAHBOUB MAALIM

*Executive Secretary*

*Intergovernmental Authority on Development (IGAD)*



# **The Manual and the IGAD Center of Excellence for Preventing and Countering Violent Extremism**

The IGAD Center of Excellence for Preventing and Countering Violent Extremism is a regional center dedicated to preventing and countering the threats of violent extremism to the Eastern Africa region. Our mission is to bring together state and non-state actors involved in preventing and countering violent extremism to develop and implement coherent strategies to build resilience against violent extremism in the Horn and Eastern Africa; to strengthen the coordination, cooperation and collaboration between IGAD member states, plus Tanzania and non-state actors involved in the prevention and countering of violent extremism; and to harness the grassroots knowledge of local communities, and involve them as active participants.

Together with training and capacity building, messaging aimed at countering violent extremism, and working with and supporting the engagement of civil society organizations to work against violent extremist threats, research and innovation is a key pillar of ICEP-CVE. The Center of Excellence is expanding knowledge through its review and dissemination of publications on violent extremism and efforts to resist and thwart the efforts of violent extremist organizations. It also is developing a network of researchers in the IGAD region (and Tanzania) who study violent extremism.

This manual represents a major addition to our research work. It provides a refreshing, important, and new approach to investigating the challenges that violent extremist organizations present. The emphasis on issues such as youth, gender, and class, and the focus on promoting trust with research participants in insecure areas, set a strong foundation for investigations that provide highly relevant and significant findings, analysis, and recommendations for civil society, governments, and citizens who work to resist violent extremism.

I hope that this manual will not only act as a research tool for researchers in the field of preventing and countering violent extremism, but also that it will stimulate intellectual and practical debate on how to effectively, efficiently, and scientifically conduct research in the ever-evolving field of preventing and countering violent extremism and terrorism.

I urge researchers in the IGAD region and elsewhere to consider, review, and ultimately apply the knowledge and advice that this trust-based, qualitative research manual provides.

SIMON NYAMBURA, PhD

*Director*

*IGAD Center of Excellence for Preventing and  
Countering Violent Extremism*

# Acknowledgments

This research manual would not have become a reality without the inspiration of Kimberly Field, the former Deputy Assistant Secretary of State for African, East Asian, Pacific and South and Central Asian Affairs in the Bureau of Conflict and Stabilization Operations (CSO) at the U.S. Department of State. Together with Neal Kringel, the Acting Principal Deputy Assistant Secretary at CSO, they committed CSO to supporting the research efforts of the IGAD Center of Excellence for Preventing and Countering Violent Extremism in Djibouti.

The proposed idea for a manual for researchers of violent extremism (in the IGAD region and far beyond) drew immediate, enthusiastic, and steadfast support from many sources, beginning with Neal Kringel and Deborah Lynn, former Acting Director of CSO's Africa Office, as well as many members of the Center of Excellence, particularly the Director, Dr. Simon Nyambura, and the Deputy Director, Daher Meraneh. I thank all of them for their patience and support for this endeavor, from start to finish, and for their friendship.

Many more people have been supportive of this manual and my work with the Center of Excellence. First and foremost, I wish to thank Ambassador (Eng.) Mahboub Maalim, the Executive Secretary of IGAD, for his backing of my secondment to the Center of

Excellence from the start, and for his belief in the potential utility of the manual for the Center of Excellence and researchers across the IGAD region.

My associates at the Center of Excellence were exceptional from the very beginning of my tenure there: warm and enthusiastic, and always providing encouragement for my work on the manual and all other efforts in which I became engaged. I express my gratitude to all of them, from Dr. Nyambura and Mr. Meraneh to my wonderfully supportive research colleague, Dr. Samuel Teshale Derbe, as well as my colleagues, Fatouma Ahmed Abdallah, Henri-Pierre André, and Emmanuel Kitonyo. I also wish to express my thanks to the Center's interns: Fathia Yonis, Leila Houssein, Ali Mohamed Idris, and, not least, Omar Ali Houmed.

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The U.S. Embassy in Djibouti's leadership and staff provided generous support to my mission. I offer warm and hearty thanks to all, but especially Ambassador Larry André and Deputy Chief of Mission Alexander Hamilton, as well as Hermes Grullon, Jessica Banuls, and Omar H. Awaleh, together with Candace Buzzard, who

worked for the United States Agency for International Development (USAID) Mission in Djibouti.

I also wish to thank two people who made exceptional and essential contributions: Lesley-Anne Long, who served as principal editor and instructional designer, and Henry Cull, who was the first graphic designer of this book.

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# Introduction

## 1.1 The purpose of this manual

The central purpose of this manual is to provide a practical guide to conducting high-quality, trust-based, qualitative field research on violent extremism. This approach is designed to help researchers of violent extremism address three major research gaps:

1. Youth vulnerable to entering violent extremist organizations (VEOs);
2. Local dynamics in areas where VEOs are influential; and
3. Why youth in certain areas enter VEOs while those living nearby do not.

The methods emphasize the cultivation of trust, inquiry with marginalized youth, a focus on understanding gender and class issues, an appreciation of the impact of surveillance and power on local environments, and analysis of youth dynamics in contrasting locations.

This manual is designed for use in areas affected by VEOs. *It is relevant and can be adapted for research in development*

*and conflict-affected contexts, and for research focusing on youth.* However, it specifically aims to build the capacity of researchers from countries that are members of the Intergovernmental Authority on Development (IGAD) who focus on VEO dynamics, and countering violent extremism (CVE) and preventing violent extremism (PVE) concerns. The manual thus addresses the following gap in research practice concerning violent extremism, CVE and PVE: “Almost none of the top scholars hail from the countries and regions most impacted by the threat of violent extremism” (Douglass and Rondeaux 2017: 9). The priority countries are five IGAD member states (Djibouti, Ethiopia, Kenya, Somalia, and Uganda), as well as Tanzania.<sup>1</sup>

*Why should anyone tell you the truth?* All field research with human subjects must address this question. It may be much safer for respondents to mislead or lie. Accordingly, the qualitative research methods described in this manual take into account the high degrees of sensitivity and risk that are prevalent in areas where violent extremism and surveillance are concerns, and where CVE or PVE efforts have relevance.

As you work through the manual, you will see that there is an emphatic focus on youth and gender because most people who enter the ranks of VEOs are youth. Both male and female youth are targets of forced and voluntary recruitment of VEOs and their supporters. The research methods you will learn will help equip you with the knowledge and skills to undertake effective VE research in the field. They will provide you with the tools and techniques to transform your research into empowering experiences for all involved.

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<sup>1</sup> Although Tanzania is not an IGAD member, it participates in the work of the IGAD Center of Excellence for Preventing and Countering Violent Extremism (ICEPCVE).



The manual makes several assumptions about research in areas of high degrees of sensitivity and risk. For example:

- Surveillance will be present in field settings (by some combination of government and/or VEO members, or their respective informants).
- Local-level distrust (caused, for example, by tensions between elites and non-elites) will impact youth lives.
- Most or many people will never have been interviewed before or have had unpleasant interview experiences.
- People are generally suspicious of, or averse to, engagement with those whom they do not know.

The research methods detailed in this manual draw mainly from the author’s experience conducting research, assessment, and evaluation work in 22 war-affected countries (mainly in Africa) over the past 29 years. Particular reference will be made to methods employed in research for *Stuck: Rwandan Youth and the Struggle for Adulthood* (2012).<sup>2</sup> An additional source of ideas for this manual is the range of teaching materials and approaches I have used in the past for classes, workshops, and seminars about field research. Publications by veteran qualitative researchers, particularly those operating in areas affected by war or violent extremism, also are important resources, together with Michael Quinn Patton’s *Qualitative Research & Evaluation Methods* (2002).

## 1.2 Who should use this manual

*This manual is not intended for field research novices. It is not a “beginner’s guide.”* It provides both an overview and step-by-step process

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<sup>2</sup> The methods are described in the “Methodological Details” section (52–67) in Chapter Two. They were originally developed with Dr. Peter Uvin, with whom Dr. Sommers wrote the USIP Special Report, *Youth in Rwanda and Burundi: Contrasting Visions* (2011).

for carrying out trust-based, qualitative field research. However, it does not even attempt to address every dimension and detail that researchers need to cover in order to carry out ethical, verifiable qualitative inquiry. The field environments for which this manual is relevant are tense, threatening, and demanding. *Newcomers to research should not attempt trust-based, qualitative research without prior training in research methodology, and prior field experience.*

The manual thus is designed to introduce a new qualitative research approach for researchers who already have been trained or have experience in the following:

- Research methods, protocols and ethics;
- Qualitative research techniques;
- Fieldwork in contexts impacted by conflict or violent extremism (or both); and
- Interviewing non-elites (such as poor people, female and male youth, and including social pariahs).

The trust-based, qualitative methods described in this manual are adaptable to development and conflict contexts, and to research on youth just about anywhere. Accordingly, this manual easily could be used by experienced researchers who do not focus on violent extremism. The only technique that is specific to contexts where VEOs are present or have influence is site selection based on the clustering phenomenon. The surveillance environment might, in some cases, be somewhat less influential in war and post-war environments. But you never know.

This manual will be of particular use for researchers who focus on VEOs, or work in contexts where countering violent extremism or preventing violent extremism either are under consideration or already underway. It supports IGAD's Regional Strategy for Preventing and Countering Violent Extremism, particularly Strategic Objective C, which aims to "Generate and share research, knowledge, analysis and information to better understand the drivers of violent extremism" (IGAD 2017: 15).

### 1.3 How to use this manual

Experienced researchers can use this manual in one of two ways:

1. *As a guide*: Researchers can use the entire manual to implement the trust-based, qualitative research approach.
2. *As a resource*: Researchers can draw from the manual to enhance their current techniques, methods, and approaches.

There has been a great deal of superb research work on violent extremism. Many existing research quantitative and qualitative techniques have yielded unquestionably significant results. Nothing written here aims to supersede or overshadow any existing research-based work in the inter-related fields of violent extremism, CVE, or PVE.

Nonetheless, we have a lot more to learn about VEOs and the environment in which they operate. The emphasis in this approach on youth, gender, class, and power, with an appreciation of surveillance and analysis contrasting youth dynamics in different localities, promises to complement existing research work.



# Context and Rationale

## 2.1 Introduction

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Prior analysis of violent extremism and the P/CVE field (Sommers 2019) underscores the need to develop a much firmer grasp of what it's like to be a youth in locations impacted by VEOs. Since VEO recruiters consistently demonstrate gender expertise, there also is a need to fortify research on gender-related issues (concerning masculinity and manhood, in addition to femininity and womanhood). Researchers and practitioners addressing challenges created by violent extremism should have a strong understanding of youth and gender-related concerns such as emasculation, failed adulthood, unmarried motherhood, and alienation. Bolstering knowledge about community belonging from the perspective of alienated youth, as well as the power of local leaders to marginalize and humiliate young people, is useful if not mandatory. A central purpose of the trust-based, qualitative approach detailed in this manual is to encourage and strengthen research on these and other issues, which constitute gaps (or deficiencies) in the field.

The expanse of potentially relevant research on violent extremism (VE) includes many thousands of books, papers, and reports in more than a dozen academic disciplines and subject areas. This section is not intended to cover the vast literature on violent extremism, but to highlight some gaps and provide information on factors relating to youth, community, and governance dynamics. It concludes with an examination of one take on current research methodologies that are used to examine violent extremism. The purpose is to refresh the reader about some of the most important themes, gaps, and factors that the research on VE has identified, as well as some useful observations of the approaches that researchers have employed. At the end of the section, there are suggestions for additional, and highly recommended, reading.

## 2.2 Gaps in research on violent extremism: An overview

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CVE and PVE are new fields, and research on violent extremism is an emerging area of inquiry. It is inherently difficult work. The approach for effective VE (and P/CVE) research that is detailed in this manual focuses on qualitative techniques, encourages trust-building, incorporates an awareness of surveillance and social tension, takes place in rural villages and urban and peri-urban neighborhoods, and highlights youth lives.

Before turning to research concerns, a brief look at existing gaps in knowledge about why some people join VEOs is useful. First, “no one risk factor” can explain “involvement in violent extremism” (Weine 2013: 85). In addition, researchers have yet to “understand why so few people actually engage in terrorist activity given the large number of people who are exposed to the same apparent antecedents” (Bux 2007: 270). Another set of researchers support this assessment by remarking on “how little we know about why some individuals choose to become terrorists and others do not” (Cragin et al. 2015: 16). Fortunately, recent advances in broader

knowledge about youth and VEOs have been noted. One group of analysts, for example, is gratified by the “waning interest in simplistic root-cause explanations of why individuals become violent extremists (e.g., poverty, lack of education, marginalization, foreign occupation, and religious fervor)” (Atran et al. 2017: 353).

Several causes of violent extremism seem to be significant, including perceptions of relative deprivation, which one analyst defined as “the absence of opportunities relative to expectations” (Taşpınar 2009: 78). Another analyst points to how “low-power insurgent and revolutionary groups” (such as VEOs) propose heroic purpose to potential recruits: “The greatest predictor of willingness to sacrifice is joining comrades in a sacred cause, which gives them a special destiny and the will to fight” (Atran 2015). A third highlights governance concerns; state repression and corruption in particular (see, for example, Chayes 2015, Ogenga 2016, and RESOLVE Network 2016). As one recent field study on violent extremism in Africa has found, “The research makes clear that a sense of grievance towards, and limited confidence in, government is widespread in the regions of Africa associated with the highest incidence of violent extremism” (UNDP 2017: 5).

Two recent appraisals of the state of knowledge on violent extremism underscore the need to conduct more research on the ground. One examines knowledge gaps on violent extremism (VE) in Eastern Africa. Among the authors’ findings are:

- An over-emphasis on depictions of women “as victims or nurturers, and ignoring the fact that . . . women are also active in VE and in VEOs” (ICEPCVE 2017: 4);
- Limited knowledge about links between diaspora populations in the West and violent extremism in Eastern Africa (Ibid.: 5);
- A persistent “lack of evidence around the effectiveness of counter-narratives and counter-messaging efforts adopted by various CVE programmes in the Region” (Ibid.: 5);

- A general lack of information about the potential contribution of psychosocial health to violent extremism, particularly with regard to “traumatised displaced populations” (Ibid.: 7);
- The need to investigate “the potential and possibility of States holding dialogue with VEOs in an effort to deal with the menace they present” (Ibid.: 8);
- “A gap in knowledge about how rehabilitation works and what happens to them after they leave the VEOs or the rehabilitation centres” (Ibid.: 9);
- The necessity for “a deeper understanding” about networks that link VEOs (Ibid.: 9);
- An ongoing need to “demonstrate impact of [CVE] interventions” (Ibid.: 11); and
- The finding that “Only a fraction of CVE literature is subjected to a peer review process, with researchers, especially in Africa, being locked out of the process” (Ibid.: 12).

The second appraisal highlights how “State corruption, abuse of power, and poor governance form the narrative arc of grievances that have fueled the rise of extremist organizations worldwide.” Accordingly, “The strategic calculus for many extremist organizations is clear: do what the government can’t or won’t do or risk illegitimacy and political irrelevance.” The analysts find that “the current vogue of scraping the Internet for clues distracts somewhat from the structural factors that drive young men and women into the arms of extremist groups.” They also state that “What is most often missing from the analytical picture is the way community responses to failures of governance drive extremist grievance narratives.” They further note that “Very little is understood about variance at the subnational level in localized support or resistance to nonviolent tactics employed by violent extremist organizations.



Research in this area has so far been guided by guess work and anecdote” (Aryaeinejad et al. 2017: 6, 7).

Low levels of understanding of VEO dynamics on the ground is highlighted by others as well. One set of analysts connects this issue to the phenomenon of “clustering.” Despite general similarities across rural villages or urban neighborhoods in one area, “clustering” takes place when youth are found to leave for VEOs in one village or neighborhood—but not from those nearby. Atran et al. cite evidence suggesting that this phenomenon in areas where VEOs are influential is both significant and little understood. They state that “approximately three-fourths of those who join the Islamic State or al-Qaeda do so in groups. These groups often involve preexisting social networks and typically cluster in particular towns or neighborhoods.” They argue that “Fieldwork is needed to identify the specific conditions under which these processes play out” (2017: 354).

A broad weakness in the literature on and practice concerning violent extremism is how gender is addressed. It begins with how people in the violent extremism and P/CVE field employ basic terms. In interviews with both development experts (Sommers 2015) and CVE experts (Sommers 2019), two shared findings were prominent. Experts from both fields reported that the implied meaning of “gender” by practitioners was “women,” while the implied meaning of “youth” was “male youth.”

One result of the two implied definitions is that female youth are virtually invisible. This is a striking and alarming finding, particularly as the recruitment efforts of violent extremist organizations often are specifically and intentionally gendered. For example, one study found that “women” in Kenya (the author calls them “women” even as their actual reference is female youth, not older, adult women) play gender-specific roles as “planners, financiers, and recruiters” for Al-Shabaab (Ogenga 2016: 3).

Another study highlighted how ISIS employs tactics that “directly challenge a male’s masculinity and shames him to join

their cause or commit attacks in the West.” In addition, “Female ISIS supporters also use narratives of shame and emasculation to reach out to and recruit impressionable ‘fence sitters’ who have not yet taken decisive action” (Beutel and Perez 2016).<sup>3</sup> Despite such analyses of the gender-specific activities and tactics employed by violent extremist organizations, generalized conceptions of women as “purveyors of affirmative change” (Couture 2014: 1) nonetheless remain prominent in literature on violent extremism. Later in this manual (Section 3.8), there is a discussion about the significance of “gender”—particularly with reference both to male and female youth—for effective research on violent extremism generally and, in particular, the trust-based, qualitative methods featured here.

Some contend that research about violent extremism (and political violence more broadly) is mainly and excessively quantitative in nature. For example, the authors of one literature review found that “Much of the literature on political violence . . . centers on game theory analysis and relies almost singularly on statistical regression analysis.” The critique then sharpens its focus. “Few studies on P/CVE-relevant topics employ social network analysis or ethnographic methods.” They consider this “a stunning finding given the body of anecdotal evidence on the centrality of social bonds and cultural currency in conflicts shaped by identity politics.” They also assert that few of “the most widely cited English-language scholars in the field . . . consistently apply new techniques or mixed quantitative and qualitative methods.” They further highlight “a shallow empirical basis for many of the programmatic responses to violent extremism.” In a comment that

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3 ISIS refers to the “Islamic State in Iraq and al-Sham (or Islamic State in Iraq and Syria): a radical Sunni Muslim organization whose aim is to restore an Islamic state, or caliphate, in the region encompassing Syria, Lebanon, Israel, Jordan, the Palestinian territories, and southeastern Turkey” (as defined at <http://www.dictionary.com/browse/isis>). The Islamist group called ISIS also is known as “Daesh” [sometimes spelled Da’esh] which “is essentially an Arabic acronym formed from the initial letters of the group’s previous name in Arabic—‘al-Dawla al-Islamiya fil Iraq wa al-Sham’ . . . In the Arabic-speaking world, where the use of acronyms is otherwise uncommon, Daesh is used widely but with pejorative overtones.” A third name for the group is ISIL, which is the acronym for “Islamic State in Iraq and the Levant” (Irshaid 2015).

resonates to the primary target audience for this manual, they note that “Almost none of the top scholars hail from the countries and regions most impacted by the threat of violent extremism.” The authors call for “a more robust effort to develop a locally informed, empirically derived evidence base.” Without such efforts, and without “continual collection and systematic review of emerging research, it will be difficult to know with any degree of accuracy what works, and what does not, to prevent and counter extremism” (Douglass and Rondeaux 2017: 8, 9).

The methods and approach contained in this manual will address many of the concerns outlined in this section: how members of villages and neighborhoods respond to community responses to local governance failures; using the clustering phenomenon (where relevant) to help uncover why some youth enter VEOs while others do not; drawing on ethnographic techniques and emphasizing local-level investigation; and building the capacity of researchers from areas where VEOs operate. The manual also will feature fieldwork with female and male youth. This is because there is abundant evidence indicating that most of those who become violent extremists are youth. In addition, there is strong documentation of appeals to gender concerns that inform VEO recruitment schemes.

### **2.3 The view from the ground: A fresh look at local dynamics**

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In this section, you will look at some of the issues relating to youth, community, and governance and how the dynamic between all three are relevant to your VE research. As you will read, there are powerful stereotypes for youth. These stereotypes are heavily gendered (for example, excluding females from the definition of “youth”) and often support the widespread (false) assumption that it does not take much for many male youth to become violent; in fact, most male youth are peaceful and few would join a VEO even if CVE and PVE did not exist (Sommers 2019).

Another commonly held assumption is that communities are more or less functional and inclusive, despite the fact that this is not always the case. Furthermore, the role of government and state repression of youth is routinely under-examined (at best) or overlooked (at worst).

As a VE researcher, understanding the dynamics of these three key “actors”—youth, community, and the state—will be critical to your work. You are going to look briefly at each of these actors next.

### Youth: Who are they?

The issues and ideas about “youth” outlined below all have relevance to your research work in the field and your subsequent data analysis. They draw directly from *Youth and the Field of Countering Violent Extremism* (2019), which itself is a critical review of youth and related concerns in the field of CVE. Box 1 below summarizes some of the key issues you will be addressing or need to keep in mind as you work through this manual.

#### BOX 1 Youth lives

- National and international definitions of “youth” routinely rely on different age ranges. Those ranges vary widely, from 15–24 (Division for Social Policy and Development n.d.) to 10–29 (USAID 2012) to 15–35 (African Union Commission 2006).
- Cultural definitions of youth often refer to transitions from childhood to adulthood, not an age range.
- To gain social recognition as an adult, many youth must meet specific cultural requirements. Almost always, a formal, recognized marriage is one of them.

- Female youth also are youth. This is essential to emphasize because they are overlooked consistently and routinely. It also is important to underscore the difference between a female youth and a young woman. In general, a “female youth” is unmarried and unrecognized as an adult. Meanwhile, the term “young woman” generally implies that the female is young and married. Challenges to these two definitions can arise with young females who are unmarried mothers, as they often transcend traditional categorization. Should unmarried mothers be considered youth or women? It may not be entirely clear.
- Across Africa, the Middle East, and beyond, large numbers of young people face a situation where marriage and recognized manhood or womanhood either is delayed (sometimes known as “waithood”; see Honwana 2012 and Singerman 2007) or impossible to reach (reviewed in Sommers 2015).

The consequences of delayed or failed adulthood can be profound. They routinely include social humiliation and alienation. The public shame of delayed or failed adulthood may compel youth to migrate to a city or another country and can encourage the regular abuse of alcohol and drugs. Over time, many youth who cannot marry become parents out of wedlock. For female youth who become unmarried mothers, the results can be devastating for themselves and their children. The often-desperate circumstances that delayed and failed adulthood trigger could provide recruitment opportunities for VEOs.

Furthermore, traditional perspectives about youth tend to be focused on their compliance and service to adults. Adults might therefore consider allowing youth recognition as worthy

contributors of significant ideas as inappropriate, distasteful, and even radical. For some elders, the idea that a female or male youth with little or no formal education should be entitled to a “voice” might strike them as preposterous (Sommers 2015, 2019).

### Community undercurrents and definitions

A common assumption about communities is that they are more or less functional and inclusive. Yet this is often not the case. Recognized leaders of communities may be more powerful than popular. There may be many populations whom leaders and their supporters actively marginalize, such as youth who are failed adults, unmarried mothers, widows, orphans, prostitutes, and members of ethnic minorities.

If your research relies on engaging with recognized community structures or leaders to reach unpopular marginalized people (sometimes called “working through the community”), there’s a chance that it will be less effective than if you engage directly with members of your target group. You should also take into account that excluded groups often form their own communities, separate from what’s considered to be the main community. Furthermore, national and international actors often consider rural villages as communities more often than urban neighborhoods.

### Governance challenges

Countries with youth bulge populations extend across Africa and the Middle East, and far beyond. Why is this fact important? The reason is that research points to a connection between nations with youth bulge populations and state repression (Nordås and Davenport 2013: 937).<sup>4</sup> Increases in state repression also have been linked

<sup>4</sup> The demographic phenomenon known as the “youth bulge” signifies an unusually high proportion of youth in an adult population. Yair and Miodownik define it as “the relative abundance of youth, a concept frequently referred to as ‘youth bulge’” (2016: 26).

to increases in violent extremism (RESOLVE Network 2016: 8). Taken together, these two correlations suggest that states with large youth populations tend to proactively repress young citizens, which can create opportunities for VEOs. In addition, it is recognized that police forces often are oriented toward serving the interests of governments and elites, not ordinary citizens (Haugen and Boutros 2014). Furthermore, predatory government corruption has been identified as a driver of extremist violence (Chayes 2015).

Understanding this broader context of how youth are defined and perceived, and the dynamic between youth and their communities and government forces, is important. It promises to help you frame your research approach and the methods you select to carry out your fieldwork and analysis. You are going to consider some of these research methods in the next section.

## **2.4 Current methods for researching violent extremism: One assessment**

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A recent review of current research methods on violent extremism and the work of CVE and PVE by James Khalil and Martine Zeuthen (2016) scrutinizes these methods in useful detail. While this is merely one take on methodological approaches applied to challenges posed by violent extremism, the discussion in this article provides an opportunity to highlight and comment on current tendencies and trends in research on violent extremism. Box 2 below summarizes five methods identified in the Khalil and Zeuthen analysis (2016: 16–17).

### BOX 2 Core methods for researching violent extremism

- Key informant interviews
- Semi-structured research tools
- Focus group discussions
- Quantitative surveys
- Observation of program activities (e.g., community debates or trainings)

You will now look at each of these methods in more detail.

#### Key informant interviews

The list of key informants “may include implementers of related programs, government officials, NGO workers, private sector representatives, religious leaders, and so on” (Ibid.: 16). Significantly, those interviewed often do not feature youth, even though youth are the overwhelming majority of people who are recruited or coerced into joining a VEO. Instead, most interviews are with elite adults. Field research on violent extremism, in short, often does not interview members of the potential target group: youth.

#### Semi-structured research tools

This refers to interviews that allow researchers to ask relevant questions that are not in the questionnaire. The inclusion of this method is positive, because the technique allows researchers to “tailor their lines of enquiry while also covering the themes of key interest.”



### Focus group discussions (FGDs)

Khalil and Zeuthen contend that “FGDs enable key information to emerge through discussion among participants.” They further state that “FGDs tend to be conducted with selected groups (such as women, youths, religious leaders, and so on) and are often used in preference to one-on-one interviews as they provide respondents with a sense of ‘safety in numbers’ while being asked about sensitive issues.”

As you will see in Part Three of this manual however, there are two problems inherent in FGDs. The first is that formal, structured focus groups are vulnerable to orchestration by powerful local elites who plant messages to be shared during the meetings with researchers. FGDs run the risk of relaying a kind of official story which is designed to hide or distort realities from researchers.

The second issue is that the degree of representation of those present in the room may be questionable, since frequently small handfuls of participants (often elites) do most of the talking. Formal, structured focus groups also may include informants (that is, spies) for the government or others. As you will see later in this section, peer groups have a better chance of uncovering underlying realities.

### Quantitative surveys

Field research tends to emphasize quantitative surveys on a host of topics, such as “perceptions of the legitimacy of violence . . . perceptions of the state, local employment prospects,” and sometimes household surveys (Ibid.). While quantitative surveys can gather important information, the process generally is not empowering of those who are surveyed. The comfort level and degree of trust for those surveyed may be low. Accordingly, the information gathered may be skewed toward self-protection, and thus may contain somewhat distorted (or incorrect) information from those surveyed.

### Observation

Khalil and Zeuthen note that “Under selected circumstances researchers may be able to observe events that drive VE, such as sermons that advocate violence.” More commonly, monitoring and evaluation exercises may “witness” program activities (such as community debates or trainings). The authors’ descriptions suggest that observations of the local context, except when they are activities arranged by CVE or PVE programmers, may be useful. However, the fact that the practice of observation is not central to all research endeavors points to a potential weakness. Observations help gauge context. They are part of the approach detailed in this manual.

## 2.5 Some observations of the research process

As well as understanding the potential benefits and limitations of the different kind of research methods that can be employed in VE research, it is important that you understand the issues that frequently arise in relation to the data collection process. Khalil and Zeuthen’s research highlights a list of “specific issues” that “routinely arise during the data collection process.” Box 3 summarizes their findings (2016: 17).

### BOX 3 **Field research: Challenges and pitfalls**

- Pressure to deliver results that suit specific/pre-determined “agendas”
- Researcher’s lack of expertise working in fragile environments
- Security-based constraints
- Cultural constraints
- Study respondents deliberately providing false or misleading information

You will now look at each of these in more detail.

### **Providing results to suit an agenda**

Research teams “may face pressure from a range of stakeholders to provide results that suit specific agendas.” In other words, stakeholders (who could be donors or governments or other powerful institutions) may intentionally undermine the veracity of the research. This may be explicit or subtle (for example, the potential for additional funding if the research reveals favorable results from the donor’s perspective). Either way, pressure on the team to produce the results they require—regardless of whether they reflect findings on the ground—will produce research that is skewed, faulty, and of questionable integrity.

### **Researcher’s lack of expertise in fragile environments**

Frequently, “even the most qualified research teams lack expertise—particularly in fragile environments.” Researchers “may fail to build adequate rapport; they may ask questions in a leading manner; they may misapply survey techniques; and so on.”

### **Security-based constraints**

The authors correctly note that “security-based constraints may prevent access to specific locations and/or individuals.” These constraints are common in areas of sensitivity or relative insecurity. They should be stated frankly when a research project is presented or discussed.

### **Cultural constraints**

“[C]ultural constraints . . . often present hurdles in locations in which [violent extremism] occurs.” For example, it may be difficult “for

men to interview women and vice versa.” In addition, “researchers from specific religious, ethnic or tribal groups may not be able to conduct investigations with individuals from other communities.” As far as is possible, preparations for addressing these constraints should be made in advance.

### Respondents providing false or misleading information

A known issue in the field is the problem of “study respondents” who “may provide false or misleading information.” All of the potential reasons for doing so are important: respondents may be “ill-informed,” “offer opinions presented as facts,” seek to “discredit others,” want to be “viewed favorably” by the researchers, are afraid of “repercussions” if they divulge sensitive information, perhaps seek to “aggrandize their own role in events,” or are simply individuals who are unintentionally deceptive. Respondents also may downplay the coercion of VEOs if they are supporters or highlight coercive recruitment tactics if they are former members (Khalil and Zeuthen 2016: 17).

Box 4 provides a recommended selection of readings on violent extremism.

#### BOX 4 Recommended reading

CT Morse. n.d. *Global Efforts in Integrating a Youth Dimension in Preventing and Countering Violent Extremism: Outcome Report*. <http://ct-morse.eu/global-efforts-in-integrating-a-youth-dimension-in-preventing-and-countering-violent-extremism-2/>

Douglass, Rex W., and Candace Rondeaux. 2017. *Mining the Gaps: A Text Mining-Based Meta-Analysis of the Current State*

*of Research on Violent Extremism*. <http://resolvenet.org/research/mining-gaps-text-mining-based-meta-analysis-current-state-research-violent-extremism>

RESOLVE Network. 2016. *Building Consensus and Setting Priorities for Research on Violent Extremism: Working Paper on Findings from Expert Consultations*. <https://www.resolvenet.org/research/building-consensus-and-setting-priorities-research-violent-extremism-working-paper>

Kilinc, Cemil, and Sara Zeiger. 2014. *Risks, Challenges and Future Research in Sahel, West Africa and the Horn of Africa*. <http://www.hedayahcenter.org/Admin/Content/File-228201585245.pdf>

Cilliers, Jakkie. 2015. *Violent Islamist Extremism and Terror in Africa*. <https://issafrica.org/uploads/Paper286-1.pdf>



# Trust-Based, Qualitative Methods

## 3.1 Introduction

As you read in Part Two, the starting point for all research with human informants is: *Why should anyone tell you the truth?* Often it is much safer to misrepresent, sidestep or distort realities, or simply to lie. The example of most residents of African cities sheds light on the utility of being risk averse with researchers. The overwhelming majority live in informal (and technically illegal) housing. Increasing numbers reside in slums (World Bank 2015). In addition, approximately 90 percent of African workers have jobs in the informal (and technically unlawful) economy, most of whom are women and youth (African Development Bank Group 2013).

In other words, in an African city, practically everyone lives in illegal housing and makes a living illegally. For residents, misleading researchers can be a form of self-protection, and a way of sidestepping prospective difficulties. The use of deception as a safeguard becomes even more important when potential danger is

added to the mix. In areas where violent extremist organizations have influence, it may be risky to speak about them—or to speak with visitors.

The research methods outlined in Part Three are informed by an appreciation of this risk and vulnerability, and an awareness that surveillance—by the state, VEOs, and perhaps others—is possible. The methods strive to build trust with informants. While there are limitations to every research approach, and most field settings present significant research challenges or constraints, working to create a reasonable comfort level with accessible informants promises to generate new opportunities for learning and get at underlying realities.

### 3.2 Trust-based research methods

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Before we turn to the general approach of the trust-based, qualitative methodology, it is useful to reflect on the capacity and expertise of VEOs. It appears that VEO recruiters have substantial gender and youth expertise, and a demonstrated knack for manipulating feelings of alienation, humiliation, emasculation, and threatened or failed adulthood. Indeed, it sadly is ironic that this is taking place when literature on gender in the VE field remains underdeveloped.

In addition, researchers working in areas where VEOs are present and/or influential must presume the presence of active surveillance by states and VEOs. The observation of a veteran researcher of VE and CVE underscores this perspective:

*Researching violent extremism can be dangerous. Threats to the safety of researchers from state and non-state actors pose significant challenges. The former is in most cases unwilling to provide access to sensitive data on activities of the security sector, prosecutorial, and correctional institutions while religious bodies and communities may not be willing to confide in outsiders.*



These and other factors and forces are addressed in the trust-based, qualitative approach featured in this manual. In this section, you are going to explore a range of methods designed to help researchers to build trust when they are in the field. Many of the methods are commonplace in research more generally, not just when researching VE, and may be familiar to you already. For example:

- Negotiating advance permission from local powers to conduct research in their area;
- Scrutinizing the selection of translators (when required), as they link researchers to those who are interviewed;
- Being forthcoming about the purpose and end result of the research;
- Keeping interviews confidential;
- Insisting that participation in interviews is voluntary;
- Using snowball sampling techniques;
- Peer group discussions; and
- Employing open-ended, qualitative questions designed to empower those who are interviewed.

Fortunately, the expectations for research to be ethical, and participation that is voluntary and confidential, are standard. What may be different is how vital these expectations, together with the other methods listed above, are when researching VE. When common methodological approaches are energetically applied, and when they are combined thoughtfully with methods like peer group discussions, intentionally empowering question sets, and snowball sampling techniques, the hoped-for end result is an environment that—as much as is possible—cultivates trust and forthcoming exchanges with those who are interviewed.

The most exciting dimension of field research is learning new, surprising, and what appears, at first, to be counterintuitive information. If done well, researchers never know what people will choose to reveal. The methods here collectively are designed to create environments where research informants feel reasonably free and relaxed to share their insights.

These methods and precautions do not allow researchers to throw off caution, however. Khalil, for example, finds much that is lacking in recent literature featuring the views of terrorists and violent extremists. In a stern assessment of several studies, he sees much to criticize:

*Researchers often seemingly accept interviewee responses at face value, overlook key theoretical insights, downplay or neglect potentially important explanatory variables, fail to offer sufficient information about their sampling methods, and deliver findings with inferences beyond what their sample allows. [2017: 12-13]*

Excepting the reference to theoretical insights, the research methods detailed in this manual promise to address Khalil's concerns.

### 3.3 Elements of trust-based, qualitative research

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Before providing a step-by-step description of trust-based, qualitative research methodology, Box 5 summarizes the key elements of the approach.

**BOX 5 Elements of trust-based, qualitative research**

- A focus on youth
- A strong accent on gender
- Awareness of surveillance
- An emphasis on building trust
- The use of snowball sampling techniques
- A preference for peer groups
- Combining understanding of reflexivity with curiosity and humility
- Proactive engagement with non-elites

You will now look at each of these elements in more detail.

**A focus on youth**

The overwhelming majority of people recruited into VEOs are youth.<sup>5</sup> Indeed, CVE and PVE action ultimately is all about youth. Accordingly, the focus of your research will be to interview young people (female and male youth) who are vulnerable to voluntary or forced recruitment by VEOs.

The emphasis on youth voices aligns with the perspective endorsed by Michael Wessells. He relates that “An important methodological lesson” for him “was the value of learning from the narratives of young people.” He highlights a “disconnection” between “adult ‘expert’ perspectives and those expressed by young people

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5 A recent report has noted that “Youth can be an age range or a life phase between childhood and adulthood. The reported age of youth who have entered violent extremist organizations (VEOs) is variable but reasonably consistent. Most appear to be in their late teens or twenties” (Sommers 2019: 7). Three research reports illustrate how most recruits into VEOs are youth within this general age range (UNDP 2017, Botha and Abdile 2014, and Bergen et al. 2016).

themselves.” Contrasting his approach to “NGO psychosocial workers” who “measured trauma and depression and prided themselves on their quantitative data and scientific approach,” Wessells instead endorses “a more humane, grounded approach of listening to the youth, learning how they understood their situation, and responding to their greatest felt needs.” Interestingly, he warns that “The overreliance on quantitative approaches also was not good science.” Instead, he recommends “a mixture of qualitative and quantitative methods to answer different kinds of questions” (2013: 87, 88).

Wessells’ assessment is entirely reasonable: qualitative and quantitative methods are complementary because, generally speaking, they answer different kinds of questions. The trust-based, qualitative method is endorsed here because it promises to attain the sort of intimate and expansive information that only qualitative interviews can gather.

### **A strong accent on gender**

As gender-specific concerns are fundamental to the lives of youth, they must be a featured dimension of the trust-based, qualitative approach detailed in this manual. Indeed, issues relating to masculinity and manhood, as well as femininity and womanhood, are central to the trust-based approach. Addressing gender issues in field research promises to deepen discussions of identity and meaning with youth participants significantly. A gender frame also should be applied to the process of data analysis.

One of the most important gender-related issues is whether and how female and male youth are able to achieve adulthood. The inability to achieve social recognition as adult women and men often leads to public humiliation. The sense of failure and shame—and for male youth, emasculation—can lead to a series of negative outcomes, including urban

migration, drug and alcohol abuse, domestic violence, unmarried motherhood, and prostitution (Sommers 2015).

The significance of adulthood-related issues potentially is unusually significant. VEOs, in their way, regularly demonstrate gender expertise: as noted earlier, their recruitment tactics address issues surrounding threatened or failed adulthood. Gender issues also may be contained or avoided by elites, who may prefer not to discuss failed adulthood and the social humiliation and alienation of youth. In addition, leaders also can display strong gender biases that favor men and male youth over women and female youth—as well as elite men over non-elite males struggling for social recognition as men.

### **Awareness of surveillance**

In areas where VEOs are thought to operate—where there is some degree of instability, danger, or risk, where there is something to hide (like illicit trade in drugs or arms, or corrupt practices of many kinds), or where VEO activities are suspected—you should presume that surveillance of your activities and the people you interview is possible if not likely. Governments are but one source of espionage. VEOs, arms, and drug traders, and so on, also may be surveilling locations where researchers are operating. It thus is essential for researchers to anticipate and prepare for the prospect of being surveilled (steps to address this concern are detailed in Part Four).

### **An emphasis on building trust**

*The gatekeepers:* Building trust does not focus only on your interviewees. Trust-building efforts begin with how you devise and introduce your research to key gatekeepers (government officials, local leaders, and so on). If possible, you should provide descriptions of, and

even give presentations about, your proposed research to these gatekeepers which highlight the “win-win” nature of the effort. That is, that your field research promises to be helpful, or interesting, or harmless, to their work and their standing. The aim is for you to persuade power brokers that learning is (potentially) beneficial to all. If they are not threatening, findings (but never specific sources) can be shared toward the end of field research in a particular area.

*In the field:* Building trust with people aims to be an empowering and emphatically positive and upbeat endeavor. The implicit idea in this research approach is that the people whom you interview are experts themselves, who will teach you their ideas during interviews.

Wessells also endorses this approach to fieldwork. He developed “A resilience orientation” which “invites researchers to investigate people’s strengths and assets in the cognitive, social, emotional, physical, and spiritual domains and to analyze how to build on those strengths.” He contrasts the emphasis on “coping and resilience” with what he terms “the deficits approaches.” He is particularly critical of those who emphasize trauma, as it “depicts war-affected people as damaged goods” (2013: 84).

In the field, two important trust-building methods are recommended: (i) snowball sampling, and (ii) working with peer groups. You are going to look at each of these in more detail below.

### 3.4 Snowball sampling

No sampling method lacks a weakness. As a researcher, this forces you to choose the one that best fits the context and your research aims. Ultimately, however, snowball sampling is the best option for your VE research for two reasons:

- i. It has been found to be “a recruitment strategy that is particularly effective in reaching hard-to-reach groups” (Sadler et al. 2010: 373)—such as youth vulnerable to recruitment into VEOs (but also including marginalized populations more broadly).

- ii. It is required in tense local environments where uncertainty and distrust are strong.

First, a word on the “snowball” metaphor. If one makes a snowball and rolls it down a snowy hill, it will pick up snow along the way and get bigger and bigger. Along the very same lines, snowball sampling allows researchers to access ever greater numbers of people in a locality by first gaining trust and developing a reasonable level of comfort with a small number of people.

Snowball sampling is grounded in the development of relationships based on trust. Establishing trust is essential when interviewing youth in particular, and especially those who are economically disadvantaged and have a low social status. It also is essential in areas of insecurity, surveillance, and threat, such as rural villages and urban and peri-urban neighborhoods where VEOs are influential.

Box 6 below sets out the technique, including the strengths and weaknesses of the approach, in more detail.

#### **BOX 6 Snowball sampling: Strengths and weaknesses**

The idea of a snowball sampling technique is uncomplicated and draws on existing social networks. “The snowball sampling outreach strategy finds an individual (the ‘source’, also referred to as the ‘seed’) who has the desired characteristics and uses the person’s social networks to recruit similar participants in a multistage process. After the initial source helps to recruit respondents, the respondents then recruit others themselves” (Sadler et al. 2010: 370).

This “semi-self-directed, chain-referral, recruiting mechanism is able to reach the hard-to-reach target group in a more pragmatic and culturally competent way” than other sampling techniques. Like any sampling technique however, it has weaknesses. The most significant is that “it is a non-probability method; that is, it does not recruit a random sample.” As a result, there may be bias: there is a danger that a network may share views that are not broadly representative. At the same time, it has been noted that “even probability sampling strategies have inherent bias” (Sadler et al. 2010: 370).

In terms of cost-benefit analysis, the absence of a control group “is often compensated for by an ability to delve deeper into selected case studies” (Khalil 2017: 7). In addition, snowball sampling is thought to provide “real benefits for studies which seek to access difficult to reach populations.” An example of such a “‘hidden’ population” is “the young, male and unemployed,” which “Policy makers and academics have long been aware” but “are often hard to locate” (Atkinson and Flint: 2001: 1). Effective snowball sampling techniques promise to open a door to engagement with many kinds of female and male youth (among others).

### How to do snowball sampling

To implement this trust-based sampling technique, you will need to walk on the same pathways through the same rural villages, and/or urban and peri-urban neighborhoods, for several days in succession. This will lead to you expanding your familiarity with area residents (particularly those who you interview), and your knowledge of local context. It also will help you to identify other people to invite to be interviewed proactively. In addition, it allows people to recommend others for your interviews, particularly through the use of peer groups (see Section 3.5).



Your daily visits to the same areas help to promote a degree of familiarity and trust between you and the residents. This approach promises to encourage more youth and adults to participate as voluntary and forthcoming respondents in your research. Spending extended time in the same research site can also go some way toward limiting the possibility of bias seeping into your sampling. For example, if indications of social divisions or conflicts surface during early interviews, it may be possible for you to create a second “snowball” sample with people sharing views that differ from members of the initial snowball set.

### 3.5 A preference for peer groups

A peer group is not the same as a focus group. The former are meetings organized by and featuring peers. The latter generally are more formal, structured groups where the researcher serves as a moderator to “encourage participants to talk to one another.” See Box 7 below.

#### BOX 7 Working with focus groups

“The focus group (FG) is a ‘non-standard’ technique of information gathering, based on an apparently informal discussion among a group of people. The debate occurs in the presence of a moderator who leads the discussion according to the cognitive purposes outlined on the participants’ characteristics, and an observer, who observes non-verbal behaviors and collects non-verbal information emerging from the interaction and integrates verbal information rising from the conversation. The discussion focuses on a topic selected by the researcher, whose aim is to analyse it in detail” (Acocella 2012: 1126).

In areas where social conflict and tensions are rife, formal meetings with focus groups to discuss a specific issue often do not work well. For example:

- i. The challenge of conformism “can derive from the pressure of social conventions, thus pushing participants to express more socially desirable and stereotypical answers” (Acocella 2012: 1129, 1134).
- ii. The topics in a focus group are “narrowly focused . . . rather than exploring complex life issues with depth and detail” (Patton 2002: 385, 388).
- iii. Focus groups are attractive to powerful figures. They are usually scheduled in advance, which enables power figures ahead of time to instruct focus group members on what to say during the focus group gathering.
- iv. Focus groups failing to represent all of those present is a major concern. Almost always, a small handful of more confident (and often more educated) focus group members dominate the conversation. Taken together with the issue of conformism noted above, it is often difficult to secure insights from focus groups that stray from the “official story” that leaders within or beyond the group assert. It also is difficult to learn about dissenting perspectives.

A peer group can minimize these concerns. For ordinary youth (and adults, and children) who never have been interviewed before, individual interviews may make them nervous and uncertain. It also may be culturally inappropriate. In such cases, you can employ the peer group method. Individuals who agree to be interviewed by you organize the meeting. They decide where and when it would be best to meet, and who should be present. You will find that young people often feel encouraged to speak if their friends are alongside them. Peer group settings tend to facilitate exploration into many

concerns. Unlike focus groups, they do not necessarily center on a single issue.

While no research method is fail-safe, and conformism in any group interviews is a potential concern, the chances of results yielding reliable information are far higher in a peer group than during staged, formalized focus groups. It also carries a higher chance of avoiding the influence of powerful people and minimizing threats caused by surveillance.

### 3.6 The importance of reflexivity, curiosity, and humility

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The concept of reflexivity is directly relevant to every single researcher working with human subjects (and, most probably, those working with a great many animal subjects, too). It is a seductively simple idea. “Being reflexive involves self-questioning and self-understanding,” Patton explains. It “reminds the qualitative inquirer to be attentive to and conscious of the cultural, political, social, linguistic, and ideological origins of one’s own perspective and voice.” Significantly, it also calls for researchers to pay particular attention to, and maintain awareness of, “the perspective and voices of those one interviews,” in addition to “those to whom one reports” (Patton 2002: 64, 65).

Everyone who attempts to conduct research with other people needs to sustain an awareness of reflexivity. It is hard to do, as it is less a skill set than a means for *vigilantly maintaining an awareness of difference* throughout all phases of a research activity.

In the researcher’s quest to maintain an awareness of difference, three tools are particularly useful:

- i. *Self-awareness* of one’s prejudices, biases, assumptions, presumptions, snap judgments, and the binding limits of all particular worldviews.

- ii. An orientation toward *perpetual curiosity*: about other perspectives, mindsets, logics, morals, outlooks, cultures, languages, traditions, and any other dimension of human experience and interpretation. That curiosity, it should be remembered, usually is reciprocal. As Brun observes, “local stakeholders are genuinely interested in my research and want to discuss new ideas. Even government officials and militant groups are interested in discussing, learning, and giving me advice” (2013: 145).
- iii. *Humility* in all engagements with those who are interviewed. Researchers should treat every informant as “someone who is teaching you about the topic” (Bingham and Connors 2013: 185). The researcher must be “comfortable in roles such as facilitator and co-learner rather than ‘expert’” (Wessells 2013: 91). Every foray into the field, and every interview that takes place there, must be seen as a unique opportunity to learn from others.

While researchers rarely have a problem understanding methodological concepts, ideas, and approaches intellectually, the reality of employing such techniques in the field can be a challenge. Discomfort should be anticipated. Reflexivity instructs you to maintain a self-awareness of the seductive nature of the culture and society to which you belong. This includes being aware of the impact of class in your research. You will consider this in more detail next.

### 3.7 The significance of engagement with non-elites

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Barriers conditioned by class and gender are among the most common that field researchers experience. The separation between elites and non-elites seems particularly pervasive because most researchers are elites, and most elites spend little or no time with non-elites. Many may know very little about them. Non-elites may make elites uncomfortable. Elites maintaining practiced distance from non-elites may use cultural techniques to achieve it. These

techniques often are so commonplace (and automatic) that elites who employ them may have little or no self-awareness of doing so.

Across the world, practiced distance between social classes (and, quite often, between races and ethnic groups) is common. Elites may be taught, from a very early age, to dismiss, talk down to, avoid looking at, and/or stay away from non-elites. Conditions that mainstream society views as distasteful, disreputable, or repugnant—low levels of formal education, having children out of wedlock, being homeless or living in a poor neighborhood, working in socially unsavory occupations such as prostitution or drug-dealing, being a former prisoner or others viewed as dangerous and untrustworthy, and so on—condition people to look down on the fundamentally less fortunate. Class separation combined with ethnic or racial difference has the power to expand suspicion and notions of difference dramatically.

Why is knowing this important? Longman's take on this issue, and why it is vital that researchers take into account the views of non-elites, is set out below.

*Undoubtedly, the most common form of research, particularly in conflict zones and other sensitive contexts, is interviewing elites—government officials, civil society activists, journalists, and other community leaders. These influential individuals are the people who are the easiest to find (they usually have offices, secretaries, and cell phones), are generally well informed (their government ministry or NGO may be directly involved in issues a researcher is investigating), and are the simplest to interview (in Africa, they are usually conversant in French or English or Portuguese, thus obviating the need for a translator from other languages). Many assessments and other quick research junkets . . . consist primarily of a series of elite interviews of this sort, in which well-informed individuals are pumped for information and analysis. [Longman 2013: 265]*

Longman explains that this practice commonly is called “key informant interviewing,” which is a term that “lends an air of

formality and authenticity” (2013: 265). He warns about the dangers of focusing on elites. “Interviewing elites . . . cannot substitute for more extensive and rigorous research methodologies.”

It definitely is not wrong or inappropriate to interview elites. The challenge arises when researchers do not also interview non-elites, or if they accord more value to the views and analysis of elites than those of others—perhaps because researchers consider them more expert and wise. As Longman notes, “In most African countries, elites—whether inside or outside the government, whether regime supporters or regime critics—often share a common perspective that separates them from the general population.” Reliance on elites “means that research results are likely to be distorted and incomplete” (Ibid.).

Elite members of countries or societies include mainstream civil society members. In my field experience, elites are often experienced interviewees; they thus know what researchers want, and how to express themselves persuasively. Longman warns that “While representatives of civil society are commonly consulted, in Africa civil society tends to be based in urban areas and dominated by intellectuals with little connection to the majority of the population” (Ibid.: 266). In addition to limited and perhaps inaccurate knowledge of issues on the ground, elite leaders naturally may employ a particular analytical lens as well.

Longman warns against failing to take into account the perspectives of non-elites: “Living in communities where they are overlooked or discounted by the more powerful members of society,” he explains, “common people often have access to information that the elite do not.” He adds that “Average people—farmers, day laborers, market women—not only are much better informed than most elites (whether domestic or international) assume but are also often very willing to reveal what they know” (2013: 267, 256–257). His insights are particularly relevant to researchers investigating violent extremism. For example: “Average citizens have a clear understanding of how conflicts take place in their communities and why people

choose to participate or not. Much of the national-level literature on conflicts tends to treat the general population as an undifferentiated mass, completely prone to manipulation” (Ibid.: 267).

### 3.8 The need to consider gender dynamics

The study of violent extremism and the practice of P/CVE features an important irony: *coverage of gender in literature about the field generally is weak—even as VEOs routinely feature gender in their recruitment schemes*. VEOs often demonstrate gender expertise while the subject remains regularly overlooked or misunderstood by many researchers and practitioners. The subject of failed or threatened masculinity stands as a significant weakness in the field, together with narrow understandings of how femininity can be used to promote or undermine the work of VEOs (Sommers 2019).

It is important to make the research team’s interest in gender issues emphatic. Everyone should know that it is a central topic of inquiry. Making this clear is essential for a number of important reasons. First, as discussed in Section 2.2, “female youth” routinely are not considered youth, or are situated as far less significant than their male counterparts, in development and CVE practice (and far beyond: the tendency to overlook or downgrade female youth is common).

Second, gender biases can make it exceptionally difficult to probe the situation of women and female youth. Jok highlights this potential research constraint. He comments that, in his experience conducting research in South Sudan, “a variety of male figures of authority made remarks [while responding to Jok’s questions] that were specifically meant to suppress women’s commentary on their daily lives and on the society in general” (2013: 160). Such powerful biases underscore the need to assign and broadcast a consistent emphasis to gender concerns—regarding females and femininity as well as males and masculinity—in your field research work.







# Getting Started

## 4.1 Introduction

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If you are an experienced qualitative researcher, you are already well versed in the ethical practices that relate to your work. You will know that nothing matters more to research work than ensuring, as much as is reasonably possible, that those who become engaged in your research work (those you interview and those on your research team) are not harmed on account of their participation. As Schnabel appropriately suggests, “At a minimum, researchers need to strive for positive results of their work and they have the responsibility to make sure that their work does not worsen the situation for those whom they study” (2001: 193). Accordingly, it is crucial to plan your precautions in advance to ensure the confidentiality and the safety both of your researchers and the people you and your team interview.

## 4.2 Qualitative research: Some methodological concerns

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It is likely that some or even many of the following principles are familiar to you already. As you read through them, think about how these approaches apply to VE research:

- *Adopt a flexible interview approach that aims to empower those who are interviewed:* Questions should be open-ended and neutral. Questions should also be non-leading and straightforward. Collectively, questions should invite each person who is interviewed to become analysts of their own societies and situations.

The purpose of this approach is to empower youth (and others who are interviewed) to describe the situations of youth in their areas, the adulthood expectations that may influence youth lives, sources of support or assistance for youth, and their plans for improving their situations. The aim is to gather the take of everyone who is interviewed (youth as well as ordinary adults and leaders of many kinds) on the local security situation, in addition to their views of extremist organizations and local leaders, development, governance, social and gender relations, and other key subjects.

To promote a conversational environment, the interviews do not have to follow a set sequence. Instead, they should be guided by the nature and direction of the responses that each informant provides. Once the discussion opens up and (hopefully) relaxes, it is possible and reasonable to ask the other questions in a questionnaire.<sup>6</sup>

- *Engage with local government and civil society organizations throughout:* As emphasized in Part One, research permission should be secured at the central and local levels. The research should include, as much as possible, both national and local government and NGOs as interview subjects. In particular, the opinions of national and local officials that deal with youth and

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<sup>6</sup> As will be discussed, the interviews always should begin by reading a script that explains the purpose of the research and stresses that any participation is entirely voluntary (no pressure to participate should ever be applied) and emphatically confidential (no names should ever be recorded—each respondent should be assigned a code). After the interview questions are asked, the respondents are invited to ask the researchers whatever questions they may have. The interviews end by asking respondents specific data profile questions (regarding their age, gender, education level, marital status, profession, and a series of questions designed to identify their economic status).

violent extremism should be actively solicited. A field priority is to ensure that research results are shared and discussed with these same actors. These debriefings often turn out to be exceptionally revealing interviews in themselves.

- *Highlight the identification of trends, correlations, and comparisons:* Interviews with youth and adults should be organized by responses to particular questions. Interview data then can be analyzed to identify the primary shared trends and themes that arose. Each group of question responses can be categorized according to the major shared trends and themes that emerge from analysis. In cases of particular relevance, correlations should be made, to reveal the shared characteristics of those who gave similar responses to the same questions.

Comparative analysis is employed to explore differences between respondents by significant characteristics, such as economic status, gender, location, age, and educational achievement. It is particularly important when the “clustering” phenomenon (referred to in Part One of this manual) is under investigation. This will entail comparing roughly the same sample of youth, ordinary adults, and leaders in two similar locations, in an attempt to uncover why youth are entering VEOs in one location and not the other.

Examples of strategies that researchers should employ are outlined in Box 8 below.

### BOX 8 Ensuring safety and confidentiality in your research

- Do not list any names in research notes or reports
- Do not share your notes outside of the research team
- Ensure that participation in the research is voluntary
- Plan ethical approaches in advance of and then periodically during the research
- Take actions to enhance the safety of every individual in the research team
- Prepare for a local “history test”
- Anticipate surveillance

You will look at each of these in more detail. As you read through the next few pages, think about how you will apply the guidance to your research going forward.

- i. *Adopt a standard policy of not listing names in your research reporting:* You can explain the policy when introducing yourself and the purpose of your research. You (and your team) must stress that participation in the research is voluntary, and that everything that participants share will be kept confidential. You should state explicitly that you will not connect any quotes to a particular individual, nor will you share information that could allow individuals to be identified.

Obviously, you must maintain these promises. Beyond adherence to your integrity, the confidentiality of all participants can virtually be guaranteed by your never taking down names and, instead, assigning everyone who is interviewed with a code. *This policy is important because interview notes cannot lead police authorities or others toward a particular person, should the notes somehow be apprehended.*

That said, some officials want to be quoted, and have their names assigned to those quotes. It thus is appropriate to leave room for exceptions to the confidentiality policy for government and non-government officials—but only when officials being interviewed want to have their name listed in the research report. However, and in general, the best interviews with officials and ordinary people take place when the officials are confident that their names will not be connected to anything they say. Not taking down the names of those whom researchers interview serves as a confidence-builder.

- ii. *Ensure that your notes are kept safe and not shared with anyone outside of the research team:* Authorities of all kinds, among others, may have great interest in researcher notes, if they get a chance to see them.
- iii. *Make certain that participation in the research is voluntary:* This is a crucial component of ethical research. Later in this manual (Section 5.3), you will consider a discussion of an informed consent process that researchers must employ with anyone considering participation in the interviews. The voluntary nature of participation is absolutely necessary, as it is central to the practice of ethical research.
- iv. *Plan ethical practices in advance of field research, and then periodically during the field research period:* There always is a chance that people can be negatively affected through the process of being interviewed by you and your research team. There also is only so much that can be done about this. You must plan in advance to prepare reasonable and practical measures to protect participants in your research—as well as you and your team. For example:
  - Do not record or videotape any interviews: This makes it much too easy for authorities to identify research participants, should anyone apprehend the tapes or files. Writing down

- all comments during interviews is a component of this research approach. Note-taking will be discussed shortly.
- Identify an organization or health center that can assist people who are traumatized: Such people may participate in interviews. It thus is useful to have referral information to share.
- v. *Take actions to enhance the safety of each individual in the research team*: Mazurana and Gale share a number of practical precautions that can enhance the safety of researchers in the field and reduce suspicion about them. They include:
- Keeping a cell phone or satellite phone charged and containing plenty of credit;
  - “Linking up with an experienced researcher or a very solid local partner such as a key NGO staff or civil society member”;
  - The suggestion that “Females—married or not—should consider wearing a plain metal wedding ring. It can help prevent unwanted attention or advances”; and
  - The strong suggestion that “researchers must look and act like who they say they are,” since many people, including local authorities, almost certainly will look for the researcher’s digital profiles online (2013: 285, 281, 289, 290). As Wood aptly warns, “you *will* be Googled” (2013: 307; emphasis in original).
- vi. *Prepare for a local “history test”*: Develop deep knowledge about your research issues and their context. Educate yourself about the issues you will be researching, and the country’s history and current situation, *before* starting your field research. This preparatory work includes interviews with experts on the subject matter you will study, and on the country where you will be working. And reading: learning context is a combination of gathering information about the relevant geography and history (of the region, country, and local area) and background on your central research issues (and how they have been addressed in the past).

Be prepared for a “history test” from community members, particularly if the conflict or crisis they are recovering from (or enduring) is based on ethnicity. People may wish to see if your version of history aligns with their own. It is not unusual for people to feel overlooked, maligned, ignored, or misunderstood. Prepare for this by interviewing experts and reading up on the conflict and the region’s history, and by becoming familiar (if possible) with the different versions of history that different groups maintain. Finally, prepare responses for your “history test.” If you don’t know the details, be frank. You might think about saying something like, “This is what I’ve heard, and I’m not sure it’s accurate—can you share the details with me?”

A warning on “history tests” is necessary. *Researchers should never agree with any version of history.* You should explain that you are conducting interviews merely to learn, *not* to take sides. The need to remain objective is something that participants have a right to learn about you and your team. It is a useful conversation for you to have with participants.

- vii. *Anticipate surveillance:* Active surveillance—by the state, by VEOs, and perhaps by others—should be presumed when field research on violent extremism is undertaken. There is no means to completely ensure that surveillance does not impact the research activity. Nor is there a means for stating what, precisely, will be required to counteract surveillance on the ground. Researchers must do their best, and sustain their efforts, as surveillance is a research constraint that needs to be understood and, where possible, investigated. Box 9 below outlines a four-step process for dealing with potential surveillance.

**BOX 9 Dealing with surveillance: A four-step process**

**First**, before entering the field, try to find out as much as possible about how surveillance works on the ground, and whether and how ordinary people deal with it. Reaching out to, and speaking with, researchers and non-government organizations familiar with the sites your team aims to visit (or areas with similar conditions), promises to be particularly useful.

**Second**, to protect researchers and participants, work hard to reassure local authorities about the utility of your work. Brun, for example, describes a useful way to do this while in the field. “My research assistants and I,” she explains, “did our best to make the so-called power holders . . . understand that we were not giving any benefits to the young people we interviewed and that we were not challenging their position as power holders in any ways” (2013: 140–141).

**Third**, work out a way to ask non-government people if there is any intelligence reporting going on in their area. What is reported, by whom, and for what purpose? Normally, it is not possible to ask such questions directly. However, snowball sampling techniques are designed to cultivate a comfort level, and a degree of easy familiarity, with people in the field site. Thus, over time in the field, the research team eventually should be able to gather relevant information—particularly after doing their homework on this issue before entering the field site. The general idea is to carefully and gently probe the issue in the field, when the time seems right to do so. Private asides about the issue, with people with whom the researchers are particularly comfortable, should be helpful.



**Fourth**, during confidential research team meetings in the field, members should ask what they think is not being mentioned by those who are interviewed. Then, they should develop strategies for attempting to draw out the information that is relevant to their inquiry. As Brun notes, “it is what people keep silent about that we need to pay attention to and seek to understand” (Ibid.: 136).

Despite surveillance and even the presence of a threatening environment, the difficulty of gathering important information may not be as difficult as one presumes. Longman, for example, shares a useful reminder about research in unusually challenging settings: “Sometimes information that one would expect to be secret is readily available. People are often much more willing to speak openly than one would expect” (2013: 256).

A final thought on this subject might be useful. In my experience, people drop coded words or phrases into interviews. Ordinary Burundians almost routinely employ this technique, for example. The purpose is to see if the researcher understands the codes. If so, then trust for the researcher improves, and sensitive, confidential information can be shared. For although, as Brun wisely states, “Certain topics cannot be discussed” (Ibid.: 144), people nonetheless may seek to refer to them indirectly. Learning codes, including code words, thus helps researchers learn and gain respect at the same time. It is a locally-specific way to sidestep the potential challenges and dangers that surveillance may present.

Learning local codes emerges from a combination of curiosity about and awareness of local context. If a reply in an interview strikes you as unusual or inexact, consider following up gently with a question about why the person responded in that way. You also can share uncommon or imprecise responses with research colleagues,

or with trusted informants in the area where you are conducting research. Spending time in the areas in which you are undertaking research, finally, promises to allow you to identify coded words and other signals of underlying meaning.

### 4.3 Constructing your research: Getting the basics right

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Why are you carrying out your research? What is the purpose? This is important to clarify, so you can communicate it to others. What do you want to investigate, and what will you do with the new information you gather? This section considers some practical principles and techniques that address these questions and will help to ensure that your research design is set up to be effective.

First, I urge all researchers using this manual to commit their research to improving and protecting the lives of others. To gain a sense of the significance and practical utility of qualitative field research, here is a sampling of commentary from veteran researchers. For all of these researchers (and so many more), integrity and a strong sense of responsibility to the people they interviewed and the issues they explored fuels their purpose and commitment to quality research that then informs action. Hopefully, these comments stir useful self-reflection:

- “I conduct research in order to strengthen practice” (Wessells 2013: 102).
- “Researchers need to commit themselves to improving conditions in the societies they study rather than preserving scholarly detachment.” This means “conducting honest research and respecting the facts, even if they are uncomfortable.” In addition, “Researchers play a role in helping to ensure that the voices of average people, those usually overlooked and ignored by policy makers, be included in discussions about the future of their own countries.” Furthermore, “Focusing purely on academic

publication . . . without trying to improve conditions by disseminating information to a general audience . . . is irresponsible” (Longman 2013: 271, 272, 257).

- “In order to be effective, research should be policy-oriented. Research for knowledge’s sake is of course good and necessary, but knowledge should eventually feed into action” (Schnabel 2001: 194).

Second, when thinking about your research, you should keep in mind three guiding principles:

- i. *Wherever possible, simplify your approach, and your language:* Simple, clear ideas and language set the stage for quality research. Doing this will make your concerns understandable to you and others and will make it much easier to explain what you are doing. More importantly, it will help guide the construction of your research work.
- ii. *Everything you do requires a rationale:* Everything you do in your research—who works with you, where you go, who you speak to, what questions you ask, and so on—should be intentional. Nothing should be random. Your rationales must be connected to two things: your core research question and the need to do ethical research that strives to protect those who are involved in it. If every decision you make relies on the same set of rationales, then your research endeavor has a better chance of holding together. It also sets the stage for producing potentially powerful new findings and analysis.
- iii. *State your central research questions and hypotheses in simple, declarative language:* Clear language comes from clear thinking. It also often invites powerful, insightful research. Your central research question should answer the following question: *What are you really after in your research?* What question does your research propose to answer? It should get to the core of what your

investigation will be about. There can be secondary questions, of course. But the central question, if it is clear to all, promises to propel your entire endeavor.

Stating the driving core of your research in plain language gives you a much better chance of developing a coherent, well-structured endeavor and communicating your findings and analysis effectively. Complicated ideas are much more difficult to hold onto. Simple, clear research challenges tend to be more powerful and more practical. They start with a central research question (and secondary questions, if deemed necessary), laid out in plain language.

Third, once the central question is established, the central hypotheses should clearly and succinctly state what the research work expects to find. The hypotheses must emerge directly from your central (and secondary) research questions. The main answer that you expect to find to your central question is your central hypothesis. For each hypothesis, there should be a rationale that explains why that you think it will be present on the ground.

Quality hypotheses thus feature two components:

- i. What you expect to find; and
- ii. What rationale (or assumptions) inform each expectation/hypothesis.

You don't need a hypothesis for everything you will study. But you need to have a set of central hypotheses that inform your research. Following this formula—(1) Research questions (central and secondary); (2) Hypotheses (central and secondary); and (3) Rationales (for each hypothesis)—will guide both the development of your research plan, as well as your analysis and report writing. It will center and focus your efforts.

When you hit the field, you will test your hypotheses. They may be correct, they may be wrong—or they may be irrelevant. The reason you conduct research is to discover what's really going on. That is why field research can be so exciting: it sets you up to learn something new. Indeed, *it's fun to be wrong*. State what you think

you'll discover. Then do the research to find out what realities exist. Deep learning and significant new discoveries often begin when the hypotheses are inaccurate and the assumptions that informed the research are turned upside down.

Box 10 below summarizes the process following your determination of your research questions, hypotheses, and rationales.

#### **BOX 10 Constructing your research**

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##### **1. Address your constraints**

- What is your budget and time frame?
- What are the places you must visit?
- What are your priority issues?

##### **2. With the research constraints in mind, ask:**

- What is the overall strategy for your research plan?
- How will you analyze your findings?
- If your research will feature comparative analysis, ask yourself: exactly what will you compare?
- What will be your criteria for site selection? What is your rationale?
- If you will be employing comparative analysis, then you need to select sites that set up your comparative framework.
- How long will you be in each field site?
- Who are the main people you need to interview?
- When you interview people, what is the information you need to get the most?
- Will you need a supporting agency to help facilitate your research? (This is common.)
- How will you balance government approval with the need to conduct ethical research?
- Who is your primary audience?

**3. Develop a draft work plan—with a rationale for each step**

- Where will you go?
- When will you go?
- How will you get there?
- What will it cost?
- Who do you want to talk to?



# Preparations for the Field

## 5.1 Introduction

Before you head to the field, there are a set of practical products and preparations that must be completed. Part Five outlines what needs to be done.

## 5.2 Writing questionnaires

The approach to writing and employing questionnaires detailed in this manual features simple, declarative language, questions designed to empower participants, explanations that transition the interview from one subject to the next, the avoidance of leading questions, and a strategy for addressing sensitive issues in ways that are not judgmental.

The recommended approach is known as a standardized open-ended interview, which features “carefully and fully wording each question before the interview” (Patton 2002: 344, 349). The aim is to ask many of the same questions to everyone. This sets the stage for comparative analysis, which will be featured later in the manual (Section 7.2). It also allows for different interviewers to conduct similar interviews.

### Recommended rules for questionnaires

The following guidance will help you shape your questionnaire:

- *Use concise, direct, unadorned, clear, straightforward language.* Clear language facilitates clear thinking, for those designing questionnaires and for those who answer the questions. It also increases the chances of accomplishing an essential element of qualitative interviews: that which the researcher asks is precisely what the participant understands. It also promotes a comfort level between interviewer and those being interviewed. “Unclear questions,” Patton correctly warns, “can make the person being interviewed feel uncomfortable, ignorant, confused, or hostile” (Ibid.: 361). Clarity is crucial.
- *Clarity of thinking and language facilitates accurate translation.* Questions often must be translated for interviews. The accurate translation of questions is an exceptionally important element of questionnaire writing. Getting the meaning right during the translation process often is difficult and time consuming.  
To facilitate the process, avoid terminology that either cannot be translated or, when it is translated, might be misunderstood. Questions normally do not require terms like “violent extremism,” for example. In fact, using such terms may send off warning signals to, or inspire unfortunate impressions within, those interviewed. Patton’s reminder on this issue is important to remember: “It is tricky enough to be sure what a person means when using a common language, but words can take on a very different meaning in other cultures” (Ibid.: 392).
- *Never ask more than one question at a time.* A common weakness in qualitative questions is asking more than one question at a time. This confuses and can disempower the person who is interviewed. It also invites imprecise responses, as it often forces a participant to decide which question to answer.



- *Ask what a person “thinks” —never what a person “feels.”* Thinking refers to the intellect and invites participants to analyze ideas and events from a distance. Feelings, in contrast, connect to emotions. This is intrusive, and quite often is culturally inappropriate. In addition, if the research participant is traumatized, questions about feelings may unlock memories and sensations that may be difficult for a participant to control. *Consistent references to what a person thinks are particularly important in tense environments*, which includes all contexts where VEOs are present or have influence.
- *Never ask leading questions.* A leading question is one that that inspires or encourages a desired answer. It is a signal to the person being interviewed that the interviewer seeks particular answers to their questions. Leading questions threaten to undermine the accuracy and utility of an interview. While the employment of leading questions is an elemental research mistake, it remains remarkably common.
- *Devise strategies in advance for addressing sensitive concerns—such as violent extremist groups—during interviews.* There is no fail-safe recipe for discussing sensitive topics. If a person being interviewed views the interviewer as credible and trustworthy and has a sense a security in his or her interview environment, they may very well share information that is sensitive. This, however, is difficult to gauge. Accordingly, researchers must work out a strategy in advance.

Box 11 below sets out what researcher Judith Gardner devised, with her research colleagues, for one study on Al-Shabaab in East Africa.

**BOX 11 Strategies for interviews about violent extremism: A case study**

We wanted to learn about Al-Shabaab from a local and personal perspective. As a result, we knew that we needed to avoid using the language of violent extremism, PVE and CVE, and to avoid making any assumptions about Al-Shabaab, in particular value judgments that might be rooted in Western security concerns rather than local experience. So, whilst Al-Shabaab often is described as a VEO and an extremist organization, we didn't apply these concepts with our respondents. We were open to the possibility that locally Al-Shabaab might be viewed benevolently; as a security provider, a law and order provider, and a provider of social services. We agreed that we would not "react" to anything that we heard about Al-Shabaab that would indicate our own values/judgment. We would simply try to listen well and demonstrate respect for our respondents.

The hardest part was working out how to approach the topic of Al-Shabaab without frightening off our respondents or directing their responses [that is, by using leading questions]. *Our strategy was to ask the respondent about their personal security over time.* In this way, we hoped to learn about where people situated Al-Shabaab along a spectrum of experience that included warlords and the Islamic Courts Union [inside Somalia]. Luckily, this approach worked. (Private interview, 2018)

**Designing your questionnaire**

The following steps provide more detail on how to design your questionnaire.

- 1 *Imagine what it's like to be the person you're interviewing, and in the context where you'll be conducting interviews.* This will help you design penetrating questions that connect with them and encourage their trust in you. For example, what if you interview a female or male youth who has never been interviewed before? What questions will enable them to relax and open up to you?
- 2 *Estimate how long it might take to carry out each interview.* You need to be sure that the person doesn't get tired or need to move on before you've gotten to the core questions that you **MUST** have answered. In my experience, the best answers to questions arrive only after 45 minutes to an hour, particularly if the participants have never been interviewed before. By two hours, people usually are too tired to continue.
- 3 *Remember that a good qualitative interview is really a guided conversation,* hopefully on an issue that really engages you and those you are interviewing. Accordingly, the questions must flow from one to another.
- 4 *Insert transition statements just before your questions shift to a different subject.* This is crucial: it allows people to follow you and prepare for what's coming. For example, at the beginning of your questionnaire, consider something like, "I am going to start our interview by asking you about [a particular subject]."
- 5 *Ask yourself about the questions and their sequence; the beginning, middle, and end of each interview.*

**Beginning:** "How can I start the interview in a way that will empower the person I'm speaking with, and make it clear that I am really interested in what he/she has to say?"

- Consider starting with general questions that invite people to share their stories, experiences, and impressions. Opening

with questions that empower the person and position them as experts or teachers (and the researchers as novices or students), helps to create a relaxed environment and get an interview going.

- You can do this by asking them to explain their situation or tell their story. Either way, the point is to invite him/her to explain things from their perspective.
- A favorite opening question of mine when interviewing youth is: *“Please tell me about youth in your area. What is their situation?”*
- This question invites participants to take their answers in a direction of their choice. It also allows the interviewer to ask gentle follow up questions to learn more.
- In my experience, people normally respond to this question by talking about male youth. So the most important follow-up questions are to clarify this—and then to invite them to describe the situation of female youth.

**Middle:** “How do I phrase my questions in a way that opens up the discussion?”

- *Remember to insert transition statements when you want to move to a new subject.* Something like, “Now I want to learn about security in your area.” That can lead to a question like, *“According to you, what is the security situation in your area?”* From there, you can ask about insecurity, and what (not who) causes insecurity.
- General concepts like “youth,” “peace,” “security,” and “insecurity” often have very specific definitions. It is useful to insert questions that invite participants to share their definitions.

**End:** “What questions, and final comments, would be a good way to conclude my interview?”

- By the end of the interview, there should be a good comfort level between researcher and participant(s). Are there certain questions that you think the participants are ready to explore with you?
- *Always close interviews on an upbeat note. A good way to end every interview is by asking participants, “Do you have any questions for me?”* Answer the questions as honestly as is possible.

Once you have thought about each of these stages of an interview, you should review the sequence of your questions and be ready to revise the phrasing and sequence. You also need to be ready to replace questions in the field that are not inspiring useful responses.

- *Version your questions for different sets of people.* Start with questions for youth, since they are most likely your main target group for interviews. Then consider what questions you might adapt or adjust for ordinary adults, government authorities, religious and other non-government leaders, and so on. If you do this, keep in mind that asking the same questions to different kinds of people opens the door for revealing comparative data analysis.
- *What are the key questions that you must ask people in every interview?* When people are busy and have limited time for an interview, then the research team must know which questions need to be asked during every interview. Be sure that the research team asks the questions that you will need most for analysis.

### **5.3 The need to secure voluntary consent— and manage expectations**

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The participation of all human participants in research must be voluntary. They cannot be pressured to provide consent. This seems like an obvious and uncomplicated element of ethical field research.

It is not. The reason is that field research often involves people who need something: food, personal security, or a voice. People living in countries where peaceful dissent is either dangerous to attempt or illegal may see incoming researchers as an opportunity to speak out. Keep in mind that it is not only governments that can be threatening: *VEOs may have infiltrated the research site, and people may be concerned about what VEO members might do to them.*

There also is the element of desperation. People who need help and feel as if they are forgotten, ignored, or powerless may perceive researchers as a potential lifeline. This situation is difficult for any researcher to handle. As Wessells wisely observes, “Even if [local people] accept that the researchers themselves will not help them and their families, they may assume that the research will soon be followed by assistance provided by others such as NGOs” (2013: 92).

In such challenging circumstances, what should a field researcher do? One action is absolutely mandatory: reading a prepared script about voluntary participation in the field research. Before any interview starts, you must read this script to anyone who is interested in participating and get their voluntary agreement to be interviewed. *Never pressure people to participate.*

The script explains the purpose of the research and states—clearly and emphatically—that a person does not have to accept to be interviewed. Their participation is voluntary. The script should be prepared and translated into local languages. Once in the field, all researchers must read it to everyone the research team seeks to interview—carefully and thoughtfully, and slowly enough for everyone to grasp it.

Box 12 provides an example of a voluntary consent script that I once used for research in Sierra Leone.

**BOX 12 Voluntary consent script**

I have carried out research in Sierra Leone three times before.

This time, I am interested in learning about three things . . .

I am inviting you to be interviewed by me—but only if you wish to be interviewed. There is no pressure. You do not have to.

If you do participate, please understand that the information you give me will remain confidential. I will never use your name. That is why I will ask you not to share your name with me.

Also, your participation is for the next hour or two, when I will ask you some questions.

After I finish all my interviews, I will write a report. I will share it with people who support or work for youth programs, to help them reach youth not in any program . . .

If you have questions about any of this, please ask me.

Patience is required during this process. It is important that you are sure that people understand what your research is about, and that they can participate only if they want to.

Here are four additional things to consider:

- i. *Manage expectations*: It is important to state, and patiently repeat as many times as necessary, that participation in the research is voluntary. If a person is unsure about participating, they do not have to. Make that clear, again and again. Wessells appropriately urges researchers to “manage expectations right from the start.” He states that it is possible to be blunt, such as stating “I don’t have a bag of cash” (2013: 95).

This comment may clarify or offend: you have to determine what line is best. What I often tell people is that my aim is for

people who are influential in governments, donor agencies, and NGOs to receive and consider my research report. I add that I cannot guarantee what they will do with that information. Hopefully, the explanation is sufficient for people to decide whether to participate. Usually, if you seem trustworthy and interested in what people have to say, and if participation seems safe, they will participate.

- ii. *State your responsibility as a researcher:* Tell people what you intend to do with the research. Will you share your findings—but never the names of anyone—with the authorities? Will you share their concerns with government officials or NGOs, if they seem reasonable? If it seems reasonable, then promise to do it. Of course, if you promise, you must do it. But if so, remember that you are not an advocate. You can relay information, but you must state to your interviewee(s) that you cannot guarantee what the government, or an NGO, or a United Nations agency will do with the information. Try your best to keep this clear.
- iii. *Consider sharing findings with the people you interview:* Logistically, and in terms of budget, this may be hard to do. Funders rarely pay for a return to the field to deliver reports. But if it is possible, it should be considered. As Wessells remarks, “Researchers collect information that could be of use to community people, and a basic, if seldom taken, step is to feed the research back to communities for purposes of sharing and to obtain another check on the validity of the findings” (Ibid.: 94). Wessells correctly states that returning to field sites to share findings and actual reports is respectful to those whom you interview. It also allows researchers an opportunity for additional validation of their findings.

The challenge is whether returning to field sites invites the suspicion of VEO members or government authorities. In other words, will either group wonder what you are doing back at the field site? Thus, before following Wessells’ useful recommendation, take care to find out, as best as is possible, that your return to the field will not endanger anyone based there.



- iv. *Never pay for or buy food (especially meals) for anyone whom you want to interview:* If you do either of these things, your work no longer is voluntary: it is merely a transaction. People will share information in exchange for something. But you cannot consider whatever they say as fully accurate.

That said, I have found that buying someone a soda or a cup of tea is fine. It can relax the interview situation. Sometimes it is necessary, if the weather is so hot that hydration is necessary. People often are hungry when they are interviewed, so soda or tea can keep them focused and eager to continue the interview. It also is a sign of recognition, respect, and appreciation for the person's contribution.

#### 5.4 Writing the profile form

At the end of every interview, gathering profile data is crucial. Gathering this data is not easy: people often have to leave as soon as the interview is complete—and sometimes before it is finished.

A component of trust-based field research is *never asking the profile questions before the interview begins*. This is because the process usually is not empowering: you may need to ask if the person is married and what level of education they have completed. If you do this at the outset, and the person is embarrassed or uncomfortable about the information they provide, then they may seek to get away from you, and leave the interview as soon as possible.

The specific questions for your profile should be attached to the research task. Consider asking about the age, gender, education level, marital status, and whether they are parents. There are ways to identify economic status. In addition to profession, you can ask

for other indicators of economic status. In urban neighborhoods, this may include where a person sleeps (it may be irregular), if he or she rents an apartment or room, and where they live. In rural areas, you may want to ask questions about where a person sleeps. If he/she is not homeless, then it may be important to know if they live in their own house, as well as the kind of housing where they live (or where they sleep).

The profile questions must be very limited: maybe 15 questions at most. The reason is that people may leave before you get all the information. As a result, all questions must relate to absolutely vital information. Box 13 is a sample of the profile form I employed with rural Rwandan youth.

#### BOX 13 Profile information

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ID # .....

1. What is your age?
2. What is your education level? (That is, the last class completed, and the kind of school.)
3. How many brothers and sisters do you have? What are their ages?
4. Are your parents living?
  - If yes, what are their ages?
    - If no, are you the head of the household?
5. Are you married?
  - If yes, what is the date of your marriage?

6. What kind of marriage?
  - Informal/two people decided to live together
  - Traditional/recognized by the community (bride price)
  - Religious ceremony for marriage
  - Civil marriage (marriage license but no religious ceremony)
7. What is your profession?
8. Do you ever work as a laborer?
  - Never
  - Sometimes
  - Frequently
  - Always
9. What kind of labor?
  - Farm
  - Non-Farm
  - [Specific details of the kind of labor?]
10. Do you ever hire labor?
  - Never
  - Sometimes
  - Frequently
  - Always
11. Have you ever been a soldier?
  - If yes, did you get your demobilization package?
12. Do you have farm animals?
  - What kind?
  - How many?
13. Criteria of person:
  - Destitute (no farm animals, thatched roof, mud house, little or no non-farm income, very little land)
  - Poor (in-between)
  - Non-Poor (they hire labor, they have Mabati roof, finished floor, etc.)
  - Wealthy

## 5.5 Site selection and comparative analysis

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Selecting research sites is critical to any field research endeavor. There are three general issues to consider:

- i. Site selection criteria should be directly connected to the central issues/questions of your research. It is important to create site selection protocols that have clear rationales.
- ii. The criteria for site selection can and often must incorporate reasonable constraints (such as limited time, limited accessibility, whether government authorities allow access, whether the site is sufficiently safe to visit, etc.).
- iii. Where possible, keep the number of sites you visit to a reasonably low number, so you can develop a depth of understanding about the issues and people's experiences you're researching.

The methodology stressed here highlights comparative analysis. There are two components of this particular kind of site selection:

- *General.* If you set up clear criteria for site selection and ask the same questions to similar kinds of people in both places, then you create a comparative methodology that can guide your analysis. Comparative analysis can be extremely useful. But to do it, you first need to lay out precisely what you are comparing, and why.
- *Specific.* The clustering phenomenon that has arisen in research on violent extremism raises an elemental question:
  - *Why do some youth in one location join VEOs while youth in a nearby location do not?*

If the two locations are reasonably comparable, then you have a chance to set up comparative inquiry to answer this question. To do this scientifically, comparability must be retained. That is:

- The same protocols should be employed to determine who is interviewed (people with similar profiles, such as youth, adults, and officials with particular characteristics).

- Then, the same questions should be asked to people with similar profiles in each location.

Applying these principles sets the stage for comparative analysis.

It almost always is useful (if not absolutely necessary) to get the approval of government authorities for any site location. This presents you with an opportunity to explain the research to officials, and to ask for their insights. A question that I typically employ when discussing such issues with government authorities is: *What is your advice?* The question often sets the stage for productive conversations that seem to inspire officials to supply very useful advice to the research team. It also can reduce government unease and suspicion about the research activity.

## 5.6 Putting together your research team

The team of researchers you assemble is critical to the success of your research endeavor. You must get it right. An elemental priority, of course, is to get people with appropriate knowledge and experience. Gender and ethnic balance also can be crucial: Will men be able to interview female youth and adult women at the research sites? Will the nationality, religion, or ethnicity of a potential research team member negatively impact the ability of the research team to secure quality findings?

Never overlook the following quality: whether a researcher, translator, or driver is comfortable with poor people. This is a major overlooked weakness in field research.

All over the world, elites spend little time with non-elites. Sophisticated university students may receive little or no training about what it is like to be disadvantaged. Elites may have been raised

to condescend to those with lesser education, or a lower social or economic status. Elites in Central Africa routinely use a particular phrase to describe their interactions with non-elites: “We inform the population.” Development parlance features two words that underscore proactive coercion: “sensitize” and “mobilize.” These ideas are entirely separate from open engagement with other people.

People who are oriented toward informing, sensitizing, or mobilizing people are likely to be very poor field researchers. The reason is that their orientation undervalues listening and being open to entirely new views and perspectives. Hiring people who (often without realizing it) somehow look down on former members of VEOs, poor people, women, girls, female youth, people of particular ethnic groups or nationalities, refugees, internally displaced people, people working in unsavory professions (like selling drugs, being a gang member, or working as prostitutes), and so on will undercut the effectiveness of the research team. *Do not hire them.*

Carefully interview, hire, and supervise your research assistants (or associates), translator(s), and driver(s). During interviews for joining the research team, politely raise this issue. Make it clear that the work days are long, the conditions are tough, and the work entails long hours of interviewing all kinds of people. People in field research sites often are sensitive to whether a person will look down on them or not. Research team members must work hard to gain the confidence of everyone, no matter their level of economic or social status.

### **Working with your translator**

The selection of a translator and his or her ability to support your fieldwork is critical. Box 14 below offers guidance for working with your translator.

**BOX 14 The role of the research translator**

Translators should not assert themselves ahead of you when you arrive at a site. They must be able to be “invisible”; to sit and transmit things that you and those you interview say to each other. The researcher is in charge. You need to inspire teamwork, and openness—but the translator should share thoughts with you after an interview (unless a misunderstanding or danger arises during it—then they need to tell you).

Try to avoid talking directly with your translator (if at all) in front of those you’re interviewing. Having a separate conversation taking place among those you seek to interview may make them worry about what you are talking about and change the open atmosphere that you are striving to cultivate.

That cultivation must start in advance. Work with your translator before you step into the field together. As Patton aptly warns, “Special and very precise training of translators is critical. Translators need to understand what, precisely, you want them to ask and that you will need full and complete translation of responses as verbatim as possible.” He further warns that “summarizing and explaining responses . . . contaminates the interviewee’s actual response . . . to such an extent that you can no longer be sure whose perceptions you have” (2002: 392). Translators also need to work out with the researchers before entering the field *exactly* how they will translate important concepts across languages.

Translation is hard to do and is very tiring. It also is essential to the work of field researchers who require them. Also, it is important to allow for the additional time it takes to translate every question and every response. Bingham and Connors correctly observe that “the interpretive process doubles interview time and definitely increases the cost and length of any significant project” (2013:195).

A major potential research problem can arise if the government assigns translators (or interpreters) to the research team. Mazurana and Gale usefully warn that “At times . . . [state] interpreters are intelligence agents or informants for the state or controlling party . . .” (2013: 287). While there is no recipe for how this can be addressed, it is important to consider whether the imposition of government translators threatens the integrity of the entire research endeavor. Pushing back—politely but firmly—to resist the government’s translators might work. But it might not, and it might undermine the quality, safety and ethics of a research endeavor. If this is the case, then you and your research team may have to close the research work, and re-start it in another area—or nation.

## **5.7 Advance preparations for trust-based fieldwork**

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This section sets out how best you can plan your fieldwork in advance. For example, you need to consider how many people you seek to interview, and what kinds of people (female youth, male youth, etc.). There should be a reasonable daily target for interviews with youth, adults, and leaders. How many people does your team seek to interview overall? What is the ratio of people you seek to interview? For example, let’s say you seek to interview 50 male youth, 50 female youth, and 30 adults in one week. The research team may find it difficult to access female youth as easily as male youth. This often is likely. If the team realizes after the first two days that they are reaching few female youth, you need to meet before or after



a field visit to strategize on how to include more female youth in the interview mix. Asking people in the village or neighborhood for advice is useful, too. It may turn out that female youth congregate in particular locations at particular times. Make an effort to go there and invite them for interviews.

Sometimes you cannot meet your interview targets. If so, identify the constraints that prevented the team from reaching the target. Describing research constraints in the final report is crucial, as it underscores the efforts and limitations that every field research endeavor faces. Try your best, note the constraints, and describe them in your final report.

### **Trust-building and empowerment**

This research approach is about building trust and empowering people to share realities on the ground. You should aim to be credible, reliable, available, and forthcoming. Figure out in advance how you will respond when people ask what your research is about. As you read in Section 4.3, clear ideas matter: as much as possible, employ declarative, straightforward language.

Obviously, it is important to use discretion with the information you share: protecting your research, the research team, and those you interview is always necessary. Any research that addresses sensitive concerns like violent extremism calls for vigilance. For example, informants for VEOs and government offices will seek information about the research. Prepare what you will say to people about your work. Hiding a general overview of the work can arouse suspicion, since people can find out what you're up to if they choose. It is best to prepare information to share (a memorized script) that does not seem evasive to the recipient.

The aim for all field researchers is to be seen as trustworthy. As Clarke explains, “researching vulnerability and violence requires the establishment of trust.” Without that trust, people “have much to lose by being too open” (2001: 103, 102). Longman’s advice mirrors that of Clarke. “Unless people trust you and have confidence that you will protect their interests,” he explains, “they are likely either to remain largely silent or merely to feed you the official line” (2013: 261).

Researchers can and must dedicate themselves to the cultivation of trust. Without sincere and consistent efforts to be credible, reliable, available, and forthcoming, people may not be honest in interviews. Bingham and Connors explain the benefits of employing these traits as, essentially, research methods. “Our honesty with our sources and our clear openness to their experiences,” they explain, “built the limited relationships that allowed us to interact with them during our interviews” (2013: 189). Cultivating a safe environment for honest exchanges is the ultimate purpose of these efforts. It also allows people to speak their mind. Often, that is precisely what people have been waiting for an opportunity to do. As Schnabel states with reference to conflict-affected contexts:

*People answer researchers’ questions perhaps because they embrace the opportunity to talk about their great disappointment with their state, their former friends who have turned into ethnic foes, or about external actors that do or do not get involved. Or, they are disappointed with themselves and the violent and often intractable situation they find themselves in. Underneath the frustration and despair, there is often a genuine desire to understand and find solutions to the quagmire of social conflict. [2001: 193-194]*

### Develop protection measures in advance of field research

It is crucial to strategize in advance to protect all members of the research team. This requires knowledge of potential dangers and maintaining helpful relations with government authorities.

Preparing a letter of introduction, signed by, for example, the Minister of a relevant national government ministry, and having lots of copies on hand, is helpful if not necessary in the field (see the example in Box 15, below). Should any law enforcement officials, or local authorities of any kind, seek information about the research, sharing a copy of the letter promises to provide useful protection for researchers and research participants. Researchers also should always also carry an identification document with them (such as a passport or national identity card).

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#### **BOX 15 Maintaining relations with government authorities: A case study**

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For youth research in Rwanda, I received a signed and stamped letter of introduction from the Minister of Youth. The letter detailed the Minister's approval of the research work, the site locations, and the members of the research team (the names of all team members were listed). I made photocopies of the letter, put them in envelopes, and distributed them to members of my research team. That way, if a police officer inquired about our permission to conduct our fieldwork, we had the letter to share. We also gained the approval (and conducted interviews) with top government authorities in the areas where we conducted our research. Since government officials had helped us identify our research sites, the authorities were accessible and interested in our research work. The police only asked us about our work once. When we shared a copy of the introduction letter from the Youth Minister, the policeman was satisfied. The precaution worked.

### Protect all field notes

This sounds like common sense. Yet it is surprising how many (even experienced) researchers become relaxed about their fieldwork, particularly if undertaken over extended periods, and let down their guard in relation to protecting all of their field notes. Furthermore, there is always the chance that government authorities (or others) will confiscate them. Again, thinking ahead on how to prevent problems is essential. Here are three recommendations:

- i. *Do not take down the names of those you interview:* As will be detailed, people who are interviewed receive codes, not names. There must be a different code for each person who is interviewed. The same code also should be used when completing each person's profile data sheet (explained in Section 5.4).
- ii. *Do not record—video or sound—any interviews:* Voices can be recognized. Equipped with recordings, government authorities may have the ability to track down people whom you interviewed.
- iii. *Ensure that all field notes are stored safely:* Allowing the notes to be easily available could invite others to review your interview data. This must be avoided. Also, figure out a way to get them out of the country safely if it looks too risky to cart them around yourself. If you then need to destroy the originals, do so as quietly and carefully as you can.

### Prepare field logistics well in advance of the field research

You have already covered some of this in Section 2.3. Two additional tactics to bear in mind are:

- i. *Find out who to email and let them know you're coming:* Always be respectful. At the same time, you will need to ask questions that invite people to assist you. Instead of asking, "Can you help me find a translator?" consider asking, "Do you have any translator

candidates to recommend?” Instead of asking, “Can you help me find a hotel?” consider asking, “What hotels [in xx town] do you recommend?”

- ii. *Set up institutional support to help you get to your field sites and conduct research:* Think about what you can provide the institution in return for their helping you out. Remember that it is generally unwise to go anywhere in war-affected areas, or areas where the presence of VEOs is suspected, without some kind of institutional support. Agencies working in the area where you intend to conduct field research (such as a UN agency or an NGO) can provide excellent logistical assistance and security back-up in case of emergency. Suggest things that you can learn while doing your research, which you could share with them afterward. Institutions on the ground also can help you line up possible support personnel to interview.

Be careful about the balance between receiving assistance and keeping an unbiased perspective in the field. Reminding people in the agency of this is useful. So are offers to share findings from your research as you move along.

### **Obtain knowledge about local logistics**

Try to find out the local rates for key items like transport (cars, drivers, petrol), translators, and researchers in advance. Keep in mind that UN and donor agencies may pay much more for drivers, transport, per diem, etc., than most NGOs. Sometimes you may be forced to choose between not contributing to the distortion of local rates by foreign organizations and hiring good quality personnel.





# Methods in the Field

## 6.1 Introduction

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The methods that are described in Part Six, from how to enter the field, to active observation, to conducting interviews and sampling effectively (there is a lot about both below), to corroborating your evidence as you move ahead, collectively aim to ensure that critical details for fieldwork are covered. Refer to this section during your field period, as the information below promises to help guide you and your work. It is important to get what you need done, and done well, in the field. Part Six should help with coverage and quality.

## 6.2 Entering the field

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Field sites are complex and challenging environments. This section aims to help you prepare for what to expect when you get there. Even for experienced researchers, a review of these practices and preparations is useful:

- *Plan what you will wear:* A useful guide is to wear pretty much what local primary or secondary school teachers wear. As a general rule, as a man, I wear collared shirts, trousers, and shoes. I do not wear T-shirts, shorts, or sandals to the field. I try to ensure that my clothes are clean and, if possible, pressed. The aim here is to be respectful and appropriate, so that the people that you've come to interview understand that you are approaching your time with them seriously and with respect.
- *Think about how you arrive at a field site:* Will you arrive in the car of an organization? This usually is unwise: if you are looking at a program or project of that organization, or if they have a presence in the field site, then arriving in the organization's car (which, in the views of communities, includes UN agencies, as well as big donors like the World Bank), may slant responses toward requests for support, and also may influence the information you are given. Accordingly, and if possible (it may not be), consider arriving in a car, bike, boat, or motorcycle that you hire, or by local transport, if it's safe and reasonably efficient to do this.
- *Try as best as you can to connect to people:* Be yourself and relax. Your presence and manner in the field draws directly from who you already are. This sounds trite, but it isn't: people will know if you're comfortable with them or not. That comfort level will greatly support your efforts. Remember to smile, engage with others, and maintain eye contact as much as possible. This is crucial: you cannot conduct research successfully without the engagement of local people. You should be delighted for every interview because your work cannot take place without interviews. Communicate your delight, in words and body language. All of this is easier if you are well prepared before you enter the field.
- *Be as forthcoming as is reasonable:* Tell people openly but diplomatically about who you are and why you are there. Share information if it is possible and reasonable.



At the same time: do not share your cell phone number, or your business card, with everyone. If an official needs your business card to help you gain access to the field site, then provide one. But in general, keep your personal information private.

- *Demonstrate integrity and reliability:* If you promise to return with a report or with photos, you should do this. If you promise to relay information to an official in the capital, follow through. At all times, remember Patton’s maxim: “Fieldworkers’ actions speak louder than their words . . . participant reactions to statements about the researcher’s role are quickly superseded by judgments based on how the person actually behaves” (2002: 314).
- *Avoid the seduction and comfort of elites:* A common response from elites to field research that I have undertaken is, essentially: *Why would this researcher come all the way to this place—just to talk to uneducated people?* As Fishstein and Wilder note about field research in Afghanistan, the “Afghan social hierarchy” encouraged “a tendency to rely on ‘reliable’ and ‘good’ informants such as elders and the educated, who were presumed to know better than the poor and uneducated” (2013: 243). This take on ordinary people is unsurprising. Researchers should anticipate this sort of response to interviewing ordinary youth (among other non-elites) in the field. It not only seems nonsensical to esteemed elites, it also runs counter to “key informant” research practices, as noted in Section 3.7.

To gain a balanced and deep understanding of local context, interviewing non-elites is required. Elites in many societies can employ a series of international development concepts that underscore their distance from non-elites—as well as their social position above them. As explained in Section 5.6, it may seem logical for elites to “sensitize” or “mobilize” people deemed below them: those labeled common, ordinary, non-elite and so on. The implication is that educated, sophisticated people should, in a phrase commonly used by Central African

elites, “Inform the population.” Their purpose is not to listen or exchange ideas, but to tell non-elite people what to do. This is inherently faulty development practice (or, indeed, CVE or PVE practice) because it assumes that “big” people know more than all others. Similarly, an over-emphasis on the views of elites in research runs the risk of shutting off learning from the majority of people in a locality. Underestimating or overlooking the views and priorities of ordinary people is, in short, a mistake.

- *Cultivate productive engagement with the authorities:* Researchers should view disbelieving commentary about interviewing non-elites in the field as an opportunity to explain to elites (among others) that their approach is inclusive. They can explain that interviewing ordinary youth is important to research on violent extremism because they are the main targets of VEOs. But the intent of the researchers is to get the views of everyone—including the authorities and other leaders, of course.

To that end, a useful policy is to debrief a local authority official or two at the end of fieldwork in their area. Sharing key findings, in a very general way, is useful. That allows officials to gather information (without knowing the names of the information sources). The interview also allows the researchers to take in the reactions of officials—and see if they corroborate the research findings. I will revisit this issue in Section 6.9.

Interviews with government officials can be remarkably revealing. For example, Longman has found that “Military officers, government ministers, and others working for a regime should not be assumed to be hostile to human rights; they may serve as excellent sources of information, able to confirm the complicity of the government or the military in abuses, though usually off record” (2013: 260). I have found some of the best interviews with authorities take place when findings are shared just before leaving an area.

- *Reserve judgment:* Perhaps the most exciting dimension of any kind of research is to have your presumptions upended. Instead

of confirming a set of hypotheses, research can open up new passages to deep knowledge.

It is important to hold back your responses to all opinions of others—until after you leave the field. The reason is simple: you cannot easily grasp the logic and power of people, organizations, and forces if you pre-judge them. Drawing conclusions about VEOs in advance limits understanding about their perspectives, rationales, logic, and methods in advance.

Prepare to set aside moral judgments *temporarily*, and only while in the field. Try to understand how the world looks from the viewpoint of others. Then, after analyzing your field data, position your findings and conclusions in proper context, moral and otherwise.

Box 16 below provides a checklist of what to remember when you go to the field.

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**BOX 16 Entering the field: A checklist**

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- *Keep the core of your research at the heart of your work*, and use it to make decisions on all revisions that you will inevitably have to make in the field: who is available to interview, which sites you can access, what you can afford to do, etc.
- *Prioritize getting quality data*; developing a depth of understanding on issues that are most important to your research endeavor.
- *Incorporate important new issues that surface in the field* (it almost always happens) into your research and questionnaire.
- *Work hard to maintain good relations* with your supporting institution (and government officials) without sacrificing your need to maintain an unbiased view and be seen as independent of the agency (as much as is possible).

- *Make sure you get lots of rest.* Also, eat a big breakfast: you cannot stop for lunch when most of those in the field site are not eating lunch. Anything that researchers bring to the site as a snack must be shared: cookies, fruit, and so on. Sharing snacks is consistent with the policy of not buying meals for people whom you interview (described in Section 5.3). Buying a meal may suggest a transactional exchange: lunch in exchange for an interview, for example. In contrast, a snack that is shared among researchers and those interviewed (and, perhaps, those observing the interview, such as young children) can simultaneously relax interview environments and provide needed energy to those involved. The research team must be part of the local area where they are working, not separate from it.

Hébert additionally recommends taking a break from the field to “recharge” the research team’s “batteries” (2013: 36). It is a great idea, and it can really help to energize the research team and boost morale. But often, it also is too difficult to afford, in terms of time and budget.

- *Always bring extra materials (paper, black ink pens—not water-based, as rain affects them) to the field.* Never allow yourself to run out of essential research supplies.
- *Review your fieldwork daily,* making analytical notes that highlight things you are learning that seem to be significant.
- *Document where you went and who you spoke with.*
- *Keep your data safe!* Patton recommends that “it is prudent to make back-up copies of all your data, putting one master copy away someplace secure for safekeeping” (2002: 441).

You will now look in more detail at techniques to use once you are in the field.

### 6.3 Active observation

For many years, people might walk through the same door to enter their office. Even if the office door has many prominent characteristics, people often cannot recall them. In other words: it is common for people to *see* things but not *observe* them. There is a very big difference between the two.

Field researchers must be able to observe their environment, identify important details, and write them down. The practice includes but goes way beyond maintaining an awareness of one's imprint on a field site (the reflexivity factor, discussed in Section 3.6). Field researchers must develop an ability to visually read the field site.

What does practicing active observation mean? It includes looking for body language, signs of power relations, hints of intimidation, divergent ways that men and women, or poor and wealthy people, carry themselves and sit, and so on. While such information is merely an impression that does not constitute verifiable data, it may be something worth exploring during interviews. Indeed, privately asking participants about your careful observations can increase the researcher's credibility in the eyes of people in the field site significantly. Box 17 below outlines what to observe when you are in the field.

**BOX 17 Making observations in the field****Body language**

- Expressions of personal space
- Eye contact (or not)
- Individual behavior
- Group behavior
- What are different people wearing?

**Social interactions**

- Are people avoiding direct interactions?
- Do people interact differently with different people?
- Are there visual signs that demonstrate power and dominance?
- Are their visual signs that demonstrate weakness and subordination?
- Are there visual signs that might suggest domestic, sexual, or other kinds of violence?

Patton details a host of advantages in the practice of active observation. They include: seeing “things that may routinely escape awareness among the people in the setting”; discovering “things no one else has really ever paid attention to”; and learning “things that people would be unwilling to talk about in an interview” (2002: 262–263). All of these possibilities provide exceptionally important opportunities to learn and exchange with people in the field. So, recognize what seem to be important social cues and clues, and write them down—and then pick your spot and discretely ask people about your most significant observations.

## 6.4 Snowball sampling

As you read in Part Three, snowball sampling is one of the most important components of the trust-based, qualitative research method detailed in this manual. If it is not done, or if it is done haphazardly, the quality of research findings may be weakened, perhaps considerably. Revisit Part Three, Section 3.4 if you need to remind yourself of the rationale for using this technique in field research.

Snowball sampling should become a ritual for arriving at, and moving through, a field site. Day after day, the research team should arrive early at the research site. They should start their work with smiles on their faces, greeting people and shaking hands. Next, researchers enter the field site by moving along the same paths, trails, or roads, every day. Detours are allowed. But start with the ritual if you can: begin your day at the same time and place and move out from there. If establishing a regular routine seems unwise (or is not allowed by your organization), then improvise: find a way to alter your route while maintaining direct and regular connection with residents in the field site.

It is important for people to become relaxed, and hopefully reassured, by the daily presence of the researchers. Your interest in people living in the village or neighborhood should be evident. If at all possible, walk everywhere. This increases the accessibility of the research team. It also expands opportunities for learning.

The idea of snowball sampling is that, over time, people become familiar and relaxed by the presence of the researchers. Those you interview should be invited to recommend others to interview. If the recommendations make sense, follow up. Hopefully, a world opens due to the access that snowball sampling provides.

Seek out those who dislike or disagree with those in the social networks you are following. This is important, as it serves as a curb against potential bias arising from a sample of people that may seem insular. Cultivating familiarity and trust with people residing at the research site is the underlying rationale for snowball sampling. People who misled researchers on the first day may correct their descriptions on the third day. A second interview also promises to secure better information. As Bingham and Connors note about working in Iraq, “A one-off interview could give us some information, but only repeated encounters could allow for a meaningful grasp of the kind of rapid, organic transformation occurring in Iraq’s resistance movement during 2003 and 2004” (2013: 191).

Regular, reliable, consistent, ritual-like routines are crucial. Come early, stay most (or all) of the day. If visiting at night is necessary, make it happen.

Keep in mind that the presence of researchers in a village or neighborhood may wear thin with local leaders after a while. If you sense this, go and see them. Promise an exit interview with the officials, if they would like one. Ask them about any concerns they may have. Remind them, politely, of the team’s last day at the research site.

## 6.5 Establishing your sampling protocols

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The research team must establish sampling protocols in advance. To do this, you must answer three questions:

- i. What are the categories of people that you hope to interview, and why?
- ii. How many people in each category will you have time to interview, given time constraints and the length of each interview?
- iii. What will constitute sufficient numbers of people in each category that you will interview? Obviously, more is best. Think this through: you have to balance limited time with coverage of different categories of people to interview.



When you can answer these three questions, you can establish reasonable targets for who those think you will have time to interview. Hopefully, you can reach your targets.

Since female and male youth are the central priority group for this research approach, it is necessary to determine, in advance, what sorts of youth will be your priority group. A key dividing line is educational achievement (primary school or lower, secondary school or higher).

Once in the field, initial interviews with youth and others might uncover additional categories of people (youth, adults, and so on) that arise as significant. For example, you might want to test the hypothesis that orphan female and male youth are particularly vulnerable to VEO recruiters. If so, add the new hypothesis to your research framework, and test it by ensuring that sufficient numbers of orphan female and male youth are interviewed at each research site.

Always keep the comparative analysis framework in mind. Accordingly, in each research site, try to interview the same sorts of youth and adults, officials at the identical or similar levels, and so on.

## 6.6 Peer group and individual interviews

The peer group method ties directly to snowball sampling. As trust and familiarity are built through snowball sampling (as well as being respectful, reliable, curious, and so on), youth and adults will be invited to be interviewed. Individual interviews are fine. However, often youth and adults (but particularly youth, and often female youth) will prefer to be interviewed with their peers: friends and sometimes relatives. As you read in Part Three, peer groups should be favored over the use of focus group meetings. Here are two things to remember when setting up a peer group meeting:

- *Invite hesitant youth and adults to set up their own peer group meetings:* They probably will be gender-specific: that is just fine, and quite often culturally appropriate. Help them think through where the best place might be to meet without interference from others (if that is possible), and what is the best time to meet. Female youth and women often are busy—a good time and place to conduct a peer group interview may be while they are cooking, washing clothes, or carrying out some other gender-specific chore.
- *Peer groups should be employed as a form of empowerment:* For example, if a female youth or two would prefer to be interviewed together with other female youth, figure out with them where the interview should take place, who should attend, and when it will occur. The organization of the peer group interview is put in the hands of those who will be interviewed. It is the job of the research team to be reliable and supportive—but not directive.

Individual interviews also are important. They facilitate exchanges that are confidential: the team may collect new and important information in such settings. Leaders (government authorities, elders, religious figures, and so on) and social pariahs often prefer individual settings. For leaders, it allows them to share private information and demonstrate their significance: the researchers are meeting them privately because of their importance. For pariahs, it may be much more comfortable to carry out interviews privately, to minimize negative attention from others.

## 6.7 Interviewing youth: Issues to keep in mind

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Gathering the voices and views of youth is a central component of the trust-based, qualitative research method. It thus is crucial to remember that most youth have never been interviewed before. They may be nervous and hesitant at the outset of interview sessions. Some may shy away from being interviewed at all. Others

may attend a peer group interview, perhaps out of curiosity, but not intend to speak. Female youth may not realize that they are youth or may see themselves as youth of less importance than their male counterparts.

There are very good reasons for such hesitance. In addition to the possibility that interviews are new for many young people, it is not uncommon for adults to look down on them. Youth may have been told that they are:

- Neither interesting nor smart;
- Stubborn and must be told what to do;
- Too young to have any interesting ideas or opinions; and
- Not supposed to talk to strangers.

Adults often think that female and male youth have nothing to contribute and may believe that if a visitor wants to learn something, they should speak only to adults like them. Indeed, interviewing youth often makes no sense to adults: since adults (most particularly men) are the experts and youth are (to them) merely young and foolish, why would researchers want to speak to youth? People (including youth) may be dumbfounded that researchers would make so much effort to visit the field site—mainly to speak to people who, the view of many in their midst, don't know anything.

This sort of response can be especially strong when the youth who are interviewed have little or no education, are considered social pariahs, drink alcohol or take drugs, work as prostitutes, are orphans or unmarried mothers, and so on. Interviewing female youth with limited education (and perhaps a child or two) may be particularly difficult for people to understand. Some may not consider them “youth.”

Researchers must be aware of these possibilities in advance. Every member of the research team must treat everyone at the research site (especially those whom they interview) with respect. Any indication of condescending, patronizing, demeaning, or humiliating behavior by any member of the research team

(including drivers and translators) toward anyone at the research site must be addressed and corrected immediately.

Be aware that some elites cannot treat people of low social status consistently with respect. If they are members of the research team, they must be replaced quickly—not with emotion, but simply because their presence is unhelpful. People who look down on those you seek to interview can undercut your research access and the results you get.

## 6.8 Leading interview sessions

A field researcher must work to ensure, as much as is possible, that the interview setting is conducive to a safe and open exchange. For example, if someone intrudes on an interview, you can proactively get up, greet the intruder, and explain that you would be delighted to interview or discuss with him or her—but after your current private interview is concluded. People entering the interview uninvited can be a common challenge. It also is one that the interviewer usually has to manage, particularly if those being interviewed have little power, influence, or social stature.

Interviews lie at the very core of qualitative research. It is important for researchers to value interview sessions as precious as well as intimate. Patton reminds us that “Qualitative interviewing begins with the assumption that the perspective of others is meaningful, knowable, and able to be made explicit. We interview to find out what is in and on someone else’s mind, to gather their stories.” Conducting interviews also requires considerable energy and attentiveness. Patton also notes that “The interviewer must listen actively and carefully to responses to make sure that the interview is working” (2002: 341, 376).

Given the significance of interview sessions, do everything you can to make them successful. With this in mind, here are some things to remember:

- *Never rush through an interview:* Take your time. The person you interview is in command. You are there to learn from them.
- *Write down all responses:* As much as possible, try to maintain control during your interviews. Ask people to stop talking for a moment, politely of course, so that you can be sure to write down everything they said. People should understand. They may also feel honored that you are taking so much time to write everything down.
- *Always bring extra paper and pens:* Never run the risk of having no paper or pens to record the interview. Since rain or spilled water can damage your notebook and make notes hard to read, always use pens with ink that stands up to water (do not use pens with gel- or water-based ink).
- *Demonstrate active listening:* When not writing down responses, maintain eye contact with those you interview. It often helps to use verbal cues (“I see,” or “mmmmm,” or something similar) to ensure that participants know you are listening at all times. When you ask a question, try to repeat parts of their responses. This shows that you are listening carefully and value their responses.
- *No touching:* Never cross this barrier. Demonstrating appropriate and consistent respect for participants is essential.
- *Never judge what participants tell you:* For you, everything participants share is extremely interesting and important: that is the message you need to communicate. If they are telling you about crimes, domestic or sexual violence, or illegal acts, determine what to do about this after your interview—when you are with your research colleagues. Find a way to separate the

confidentiality of your interviews from acting on the general issues that may arise during interviews or casual conversations in the field.

- *Use stories to help participants expand their descriptions:* Sometimes participants cannot grasp what a researcher seeks, are hesitating to describe something sensitive but important, or are not mentioning an issue you hoped they might discuss.

Consider such challenges as opportunities to change the dynamic. When I see a participant struggle, I often put down my pen and paper, and ask if I can tell a story. Often, it is about an issue that has been discussed in other research settings. I describe what I learned, and then ask, “Is the situation the same here, too?” Since people love stories, and since the stories contribute new ideas and insights to the interview environment, they can stimulate energetic responses from participants.

- *Mix neutrality with empathy:* Patton describes this orientation well:

*Neutrality means that the person being interviewed can tell me anything without engendering either my favor or disfavor with regard to the content of her or his response. I cannot be shocked; I cannot be angered; I cannot be embarrassed; I cannot be saddened. Nothing the person tells me will make me think more or less of the person.*

At the very same time, the person being interviewed should know that the researcher is empathic; that “I care very much that the person is willing to share with me what she or he is saying.” The result is the construction of rapport between researcher and those whom the researcher interviews. This rapport “is built on the ability [of the researcher] to convey empathy and understanding without judgment” (2002: 365, 366).

## 6.9 Corroborating evidence in the field (Triangulation)

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The methods featured in trust-based, qualitative research, and detailed throughout this manual are designed to cultivate the emergence of new and important findings. When participants share significant commentary, particularly when there is consistency in the comments of many participants, then researchers must seek to corroborate what they have found.

There are many ways to do this. Here are three sets of ideas:

- *Insert new questions into the questionnaire:* When potentially significant findings arise, it is wise and appropriate to insert new questions into the questionnaire. This allows the research team to track key new findings while in the field, and explore the extent of their significance.
  - *Use exit interviews with authorities and elites to share important new findings:* A useful ritual is to offer to provide exit interviews to powerful and influential government and non-government officials. You can use these interviews not just to share key new findings. Much more important: use them to record the reactions of officials to your key findings, and then explore each finding with them.
  - *Consider employing triangulation methods:* Triangulation “is based on the premise that no single method ever adequately solves the problem of rival explanations.” The process of “triangulating with multiple data sources, observers, methods, and/or theories” can allow researchers to “make substantial strides in overcoming the skepticism that greets singular methods, lone analysts, and single-perspective interpretations” (Patton 2002: 555, 556).

There are many kinds of triangulation methods. Two that focus on corroboration of new findings are noted above. There are many others, including:

- Comparing observations with [interview data];
- Comparing what people say in public with what they say in private;
- Checking for the consistency of what people say about the same thing over time; and
- Comparing the perspectives of people from different points of view (drawn from Patton 2002: 559).

Time and budget constraints can limit corroboration and triangulation efforts significantly. Researchers must consider the best way to corroborate/triangulate, so that they can leave field sites with confidence that their findings are valid and at least reasonably significant. That often is the best that can be done.





# Analysis and Write-Up

## 7.1 Introduction

Fieldwork is physically and mentally demanding. It is good to take a break (if at all possible) before you shift to analysis and write-up. A bit of distance, and perspective, can help you prepare for the equally intense work that is required to finalize your research work.

The descriptions for data analysis and drafting your report emphasized the practical. If these steps are not done well, the hard work you endured in the field ultimately will not have much impact. Part Seven concludes with final thoughts about making your research endeavor influential.

## 7.2 Data analysis

All research roads lead to and flow from data analysis. If your analysis is not thought through and performed well, you are left with conjecture.

This section divides into two parts. The first draws from Patton (2002) to review four key elements in qualitative data analysis. The

second draws mainly from the data analysis process that I used for *Stuck* (Sommers 2012). It describes one way to analyze qualitative data. It incorporates comparative analysis, as the comparative framework runs to the core of the methodological approach that this manual proposes.

### General concerns

Patton's reminders provide excellent grounding for all qualitative data analysis work:

- *Telling the story of the data*: “What people actually say and the descriptions of events observed remain the essence of qualitative inquiry. The analytical process is meant to organize and elucidate telling the story of the data. Indeed the skilled analyst is able to get out of the way of the data to let the data tell their own story.” (p. 457)
- *Using issues to help frame your analysis*: The analysis suggested in this manual is “organized to illuminate key issues” that surface from the interview data. (p. 439)
- *Highlighting inductive analysis*: The identification of themes or categories is central to the analysis process detailed below. It also runs to the core of inductive analysis, which breaks into two approaches:
  - Identifying, defining, and elucidating “the categories developed and articulated by the people studied.”
  - Reveal “categories or patterns for which the people studied did not have labels or terms.” The analyst thus has to develop “terms to describe these inductively generated categories.” This kind of information often is new and significant.
- *The need to classify (or code) the data*: Patton warns that “Without classification there is chaos and confusion” (2002: 457, 439, 454, 463). The eight-step process outlined below addresses this concern.

### Suggesting a specific data analysis process

The following eight-step data analysis process sets up you up to answer twelve crucial questions about your research.

**Step One:** Write up all interview notes as computer files. For each person you interviewed, the notes must identify: (1) Each question asked; (2) The response provided; and (3) Their code. *Do not insert the names of those you interviewed.*

**Step Two:** Make a macro file to input all profile data. Then fill it in for every person interviewed, using their code to identify them.

**Step Three:** Organize the interview data so you can read it in two ways: (1) As entire interviews (to get to know how people responded to questions in each interview); (2) As responses to each question (to get a sense of trends and key themes that arose). Although it will be tempting, *do not check the profiles when you read the data.* Instead, use this step to identify the key themes, issues, and trends that arose in responses to your questions. This allows you to answer these questions:

- What are the most significant themes, issues, and trends that arose in your data?
- What proportion of respondents to each question provided the same or similar responses? What really stands out?

**Step Four:** Correlate significant trends and issues that you identified with the profile data. This allows you to answer two questions:

- What kinds of answers correlate with particular kinds of people? That is, who is responding to a particular question in a similar way? What might this signify? Please note that sharing proportions for different responses to the same question (for example, 35 percent of female youth respondents had a specific plan for their future while 65 percent of female youth respondents

did not) is more convincing with a reasonably significant number of respondents. I provided proportions for different kinds of question responses in *Stuck* (Sommers 2012), as my sample size was significant.

- What perspectives and priorities do key groups express? What is the viewpoint of, for example, male youth with limited education? What is most important to them? About what are they most fearful? And so on.

**Step Five:** Address the clustering phenomenon. Comparing answers to the same questions by people with similar profiles—but from different field sites—promises to allow you to answer these questions:

- What significant differences and similarities emerge when the responses by people with similar profiles—but from different field sites—are compared?
- What do these similarities and differences indicate? *Might they explain why some youth in one site enter a VEO, while youth with similar profiles in a nearby site do not?*

**Step Six:** Assess the validity of your main findings.

- Which of the major findings from the interview data are corroborated and/or triangulated? These are the findings that you can state emphatically.
- Which major findings from the interview data were you *not* able to fully corroborate and/or triangulate? These are the findings that you can state with reasonable confidence (the findings suggest, the findings indicate, etc.).

**Step Seven:** Assess whether your hypotheses anticipated what your research revealed. Then ask yourself:

- Why did each hypothesis prove correct or incorrect?

**Step Eight:** Assess the context of each research site: the primary historic, geographic, social, cultural and other contextual issues that you learned about over the course of your research work (through observation and inquiry).

- What contextual issues influenced and shaped the issues and questions that your research investigated significantly?
- What was significant about issues that people (or most people) had to avoid discussing? Why did people (or most people) not discuss them in your interviews?
- What constraints affected your research work? How did they limit your work?

### 7.3 Writing the report

First, a word on jargon. Don't use it. Academic jargon in particular is a means of calling attention to yourself. Using it will divert attention from your findings. It also makes your report much less accessible. For some readers, the use of jargon may diminish their interest in your report, perhaps entirely. If you seek practical impact from your research, there are no benefits to using sophisticated jargon in your report writing.

A second word of advice is to use the passive voice sparingly. The passive voice mainly is a means of shielding the essentials of research—what the researcher found and why it is important. Accordingly, do not hide. As Patton correctly advises, “Writing in the first-person, active voice communicates the inquirer’s self-aware role in the inquiry” (2002: 65). That is recommended—or simply stating the facts of the research and citing certain kinds of people (a government official, a civil society leader, a non-elite female youth, and so on) as the source of particular quote. However, in some situations the use of the passive voice is necessary, as it is a

device for protecting research participants. But employ the passive voice only when it is unavoidable. Excessive reliance on the passive voice threatens to make your narrative dull, and even boring.

How do you express findings if you are not entirely sure of their validity, or the extent to which they are representative? There are a lot of ways to describe such findings. Here are two:

- You can state that “the research points to/suggests/indicates” a certain result, and then provide your evidence and reasoning to back it up. *Note that you are removing “I” or “we” as pronouns. You are allowing the evidence to speak for itself. That strategy can be powerful.*
- You can also speculate about what a finding or set of findings arising from the research signifies. In such cases switch to the first person, detail your interpretation, and then explain why your speculation is likely to be true.

As noted in Section 4.3, clear language comes from clear thinking. Make your report count by making it clear and well structured. Patton provides useful guides that all researchers should keep in mind:

- Focus on quality and clarity: The “final step” of any research project is “completing a report so that others can know what you’ve learned and how you learned it.”
- Remember that “The keys to all writing start with (1) knowing your audience and (2) knowing what you want to say to them.”
- Reporting on research calls for knowing something about the author. What training and experience in your background, and areas of expertise, are relevant to this study? State them early on in your report: the audience needs to know who the authors are, and why their take is credible. Remember that “The principle

is to report any personal and professional information that may have affected data collection, analysis, and interpretation.”

- Patton reminds us of “the importance of intellectual rigor, professional integrity, and methodological competence. There are no simple formulas or clear-cut rules about how to do a credible, high-quality analysis. The task is to do one’s best to make sense of things” (2002: 502, 503, 566, 570). This is excellent advice for any researcher.

This manual focuses on how to produce credible, high-quality qualitative research. Reports that draw from this sort of research should demonstrate credibility and quality. With that in mind, here are some thoughts on report writing:

- Most senior policy-makers do not have time to read much. Junior staff members usually read big reports. In order to reach the decision makers, ensure that you write an executive summary, placing it at the front of your report. Remember that “The executive summary is a dissemination document, a political instrument” (Patton 2002: 512). It thus is best also to produce an executive summary as a separate research product, as it can facilitate the sharing and reading of your report findings, analysis, and recommendations much more widely.
- Writing your methods section well is critical. People need to know how you gathered and analyzed your research findings. State them clearly and try not to be dull or boring. You always can insert questionnaires and other tools as appendices to your report.
- Organize your report well, and structure it to make it readable. It is always better to have more short sections than fewer long sections.
- If your report’s recommendations are not practical and easy to envision in reality, you are wasting your time. Recommendations

can reveal just how little the researchers know about how the policy and practice worlds work. Alternatively, they also can underscore urgency, and why certain recommendations must be followed. Aim for the latter, of course. In addition, sometimes it is plainly necessary to insert or even feature challenging recommendations. If so, do not back down: just state your reasons why they must be enacted.

Finally: *anticipate criticism but never be defensive*. Let your facts, analysis, and recommendations speak for themselves. The world increasingly is dominated by quantitative data. This is usually what government and non-government officials rely on for their information and rationales for action (or inaction). In my experience, significant and impactful new findings that draw from qualitative research are almost always questioned by those in power. Government officials in particular may challenge new research by attacking the credibility of the source—the researcher—as a way to call the research into question.

Prepare for this: the research approach I describe in this manual is the one I have employed and refined over the last 29 years. It routinely reveals surprising information that influential institutions and people sometimes challenge. Your responses thus should be factual and clear. They will be bolstered by avoiding the “I” and “we” pronouns, and instead centering your evidence and analysis as the revealer of important realities that those in power must consider and address.



## 7.4 Final thoughts

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*Make a difference.* The power of unbiased, well-constructed, well-written research is that it can uncover important new insights and point to necessary corrections and reforms. This is precisely what this manual seeks to inspire: the production of thoughtful, quality research that promises to safeguard and improve the lives of those impacted by the work of violent extremists—as well as others who seek to marginalize, threaten, or manipulate them.

To do this, the methods must be ethical and establish, at a minimum, a reasonable degree of representation. The writing must be clear, engaging—and devoid of jargon and other kinds of language that is difficult to grasp. Always remember that if you have confidence that your findings and analysis are significant, then state your case, back it up with solid evidence and context, never be defensive, and clearly and thoughtfully suggest what changes are required.

Finally: do not rest when your report is (most hopefully) published. That's when the fun really starts: push your work forward (politely but firmly), share it, and present, tweet, and blog about it. New and important findings and analysis may be hard for people to swallow—at first. Make it hard for anyone to overlook your work!



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# About the Author

**Marc Sommers** began conducting qualitative field research nearly three decades ago. Since that time, he has provided strategic advice and carried out research, assessment, and evaluation work for donor and United Nations agencies, non-government organizations, and policy institutes in 22 war-affected countries (16 in Africa). His field experience in and expertise on Central and East Africa, the Mano River region of West Africa, South Sudan, and Kosovo is extensive.

Much of Dr. Sommers' research has focused on the lives, perspectives, and priorities of war-affected youth. His work also has addressed many other issues, including gender, governance, informal economies, exclusion and inclusion, education, peacebuilding, conflict, forced migration, urbanization, and development.

Dr. Sommers wrote this manual while working as a Senior Research Advisor for the IGAD Center of Excellence for Preventing and Countering Violent Extremism in late 2017 and the first half of 2018. He was seconded to work there by the Bureau of Conflict and Stabilization Operations (CSO) at the U.S. Department of State. For nearly three years prior to his Djibouti assignment, Dr. Sommers served as a Senior Conflict Advisor for CSO in Washington, DC,

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Dr. Sommers taught for many years at The Fletcher School (Tufts University). One of his courses concerned qualitative research methods in war-affected contexts.

Dr. Sommers has written nine books and received four book awards. A primary source for this manual is his seventh book, *Stuck: Rwandan Youth and the Struggle for Adulthood* (2012), which received an Honorable Mention for the 2013 Bethwell A. Ogot Book Prize. His book, *The Outcast Majority: War, Development, and Youth in Africa* (2015), received the 2017 Jackie Kirk Award and an Honorable Mention for the 2016 Senior Book Prize from the American Ethnological Society. A third book, *Fear in Bongoland: Burundi Refugees in Urban Tanzania* (2001), received the 2003 Margaret Mead Award.

Dr. Sommers is a former Fellow of the U.S. Institute of Peace and the Woodrow Wilson International Center for Scholars. He is a member of the UN Advisory Group of Experts for the Progress Study on Youth, Peace and Security. Based in the Washington, DC area, he is affiliated with the African Studies Center at Boston University. He received his PhD in Anthropology from Boston University in 1994.