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GREY MATTERS

A GUIDE TO COLLABORATIVE RESEARCH WITH SENIORS

Nancy Marlett and Claudia Emes

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Appendix 3

Sites and Sources: Seniors and Resilience Research Proposal

By N. J. Marlett and C. G. Emes

Relevance/Responsiveness to the RFA: Today the seniors' point of view is commonly absent in policy and everyday decisions that deeply affect them. The result is to underestimate the capacity of seniors to manage their own affairs while marshalling effort and resources that are unnecessary and possibly counterproductive in the mistaken belief that they are thereby being helped. Given this, and within the priority research area of healthy and successful aging, this innovative pilot study engages seniors as leaders and participants in: 1) setting research directions, 2) developing research skills and building senior research capacity, 3) promoting and advocating research about seniors by seniors, and 4) translating findings into future related research and

policy. The results from the pilot research were used as the foundation for a full operating research proposal in 2004/2005. The purpose was to study resilience as an interactive process between individuals, their social groups, and communities, as one aspect of healthy aging. The team's vision is to establish the Kerby Centre as a community-based Centre of Excellence that attracts students and new researchers to work with seniors in pioneering new research directions about successful aging.

Background: In preparation for this pilot, funding from CIHR, the City of Calgary, and private funders was used to run a series of workshops and to support a research steering committee. The steering committee includes retired academics (professors emeriti), current university professors and community researchers (seniors, affiliated professionals and policy-makers) interested in the social construction of resilience in relation to health and successful aging. The initial workshop attracted close to 200 seniors (age 60 and over). Eight research working-groups involving approximately fifty seniors, were established as a result (Table A1).

Table A3.1. Summary of existing research groups and the research leadership: Pilot Project CIHR-IA.

RESEARCH DOMAIN	TEAM LEADER	EXPERTISE
Gender	Dr. Joan Ryan	Anthropologist, PAR with women, aboriginal peoples, and immigrants
Physical activity and leisure	Dr. Bob Stebbins	Sociologist, grounded theory of leisure and work
Ethnocultural	Dr. Mo Watanabe	Medicine, interest in cultural foundations of health
Spirituality	John Pentland	Minister and Community Development with Seniors
Intergenerational	Dr. Greg Fouts	Psychologist, resilience research with children and adults
Health	Dr. Jean Miller	Nursing, health care models for seniors
Education	Dr. Ralph Miller	Education and growth
Rural	Dr. Geoff Elliott Al Hagan	Kinesiology, Public policy

In anticipation of approval of the pilot study, the City of Calgary funded two workshops for the fall of 2003. The first introduced Participatory Action Research practices and principles and used current research on gender to teach senior participants to conduct interviews. Seniors were also asked to nominate community locations as sites where resilience is fostered and maintained.

In November 2004, a second workshop introduced research fieldwork, participant observation, and community mapping methods. The participants were invited to visit one of the sites recommended in the first workshop and to contribute to the community maps of the city and the health authority.

Literature Review

Grotberg (1996, 2) defines resiliency as “the human capacity to face, overcome, and even be strengthened by experiences of adversity.” Health Canada (1997) defines it as “the capability of individuals and systems (families, groups and communities) to cope successfully with significant adversity or risk.” While further studies relating health and resilience with seniors have yet to be done, there is a strong research tradition surrounding resilience in nursing, psychology, and social work. The majority of studies focused on individual traits and characteristics (Quinney and Fouts, 2003; Fraser, M.W., Richman, J.M., & Galinsky, M.J. (1999), on adolescents and children (Jacelon, 1997; Felton, 2002), on response to adversity (Zimmerman, 1999; Greene, 2002) on strategies for coping with adversity (Ramsey and Blieszner, 1999; Gerrard, 2003; Kulig, 2003) or on community resilience (Brown and Kulig, 1996/7; Stehlik, 2003). For this study, we have adopted the definition by seniors at the workshop who saw resilience to be “about moving beyond adversity to strength, about turning hardships into insights and about skills and character that lead people to anticipate that they can handle future challenges.” This definition reflects the process of responding to challenge and broadens the scope to include social groups and communities.

Seniors have been found to be reliable and insightful researchers (Good and LaGrow, 2000; Prager, 1995) and various Participatory Action Research methods based on constructivist theory have been found to be effective with seniors (Hurd, 1999; Smith et al., 1997;

Leonard and Nichols, 1994). Four methods used in participatory research have been selected for this pilot (see Table A2): 1) participant observation and community mapping (Elliott et al., 2001; Parks and Stoker, 1996; Witten et al., 2003; Stringer, 1996; Monette et al., 1986; Hurd, 1999; Aleman, 2001),

2) survey methods (Stringer, 1996; Monette et al., 1986), 3) focus groups (Morgan, 1993; Stringer, 1996; Lingafelter, 2002) and 4) narrative interviewing (Tate et al., 2000; Rubin and Rubin, 1995; Herzog and Rodgers, 2001).

Table A3.2. Research methods chosen for evaluation. Pilot Project CIHR-IA.

RESEARCH METHOD	ASPECTS COVERED	FOCUS OF RESEARCH TRAINING
Field-work	Participant observation, ethnography, community mapping	Observation, recording, transcriptions, descriptive analysis, inter-rater reliability
Survey	Structured and open-ended questionnaires: face to face, telephone, written	Standardized interviewing protocols, overcoming bias in recording open-ended responses, descriptive statistics on data, coding open-ended responses
Focus groups	Popular education and PAR methods for groups	Facilitating research groups, audio tape records, group methods of prioritizing ideas, movement from knowledge to plans for action and follow-up
Narrative method	Narrative interviewing, stories, scripts, metaphors	In-depth individual interviews, use of case examples as triggers for narratives, transcription, and content analysis

Purpose

This pilot explores innovative ways of involving seniors in research about successful aging. Specifically, the pilot will investigate, test, and evaluate methods of engaging twenty to forty seniors as researchers, in eight areas (Table A3.1) related to resilience in preparation for submission of a CIHR operations grant.

Objectives

- To investigate methods of engaging seniors as researchers.
- To train groups of volunteer seniors to do and evaluate Participatory Action Research.
- To develop and test research methods and tools appropriate for use by seniors with seniors.

Research Questions

1. What are effective and non-effective ways of engaging seniors as researchers? What are the enablers, challenges, and lessons learned in such activities?
2. What are the elements of a successful/unsuccessful research training process for volunteer seniors? What constitutes appropriate, valid, and feasible quality control for such training?
3. What are valid and feasible research tools and approaches that can be used by seniors when seniors are conducting research on healthy aging?

Method: The research structure (Figure 1) reflects current working relationships established after the workshop.

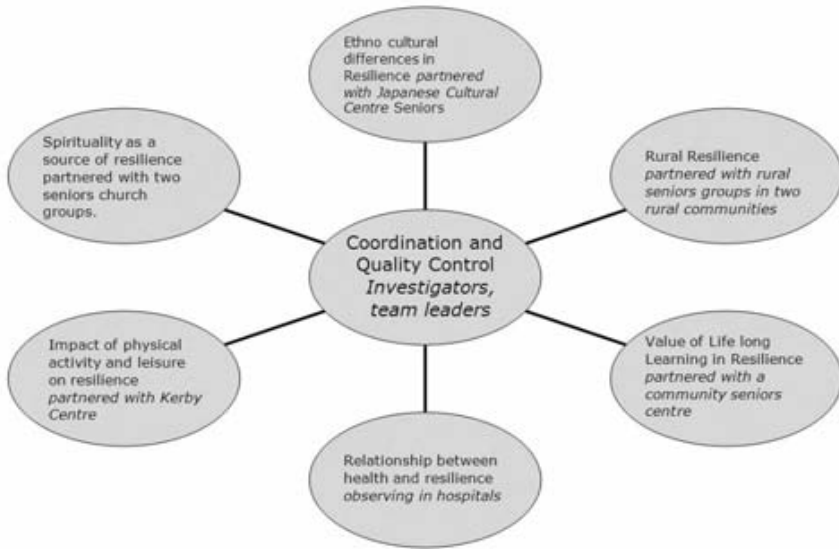


Figure 1: Research domain structure: Pilot Project CIHR–IA.

The structure builds praxis between the steering committee, senior researchers, students, and interested professionals within the research groups, enabling a strong forum for generating ideas, overseeing the implementation of the research agenda, and problem-solving. It is guided by PAR principles and practices (Marlett, 1998; Smith et al., 1997) and incorporates four major research methods: field-work, survey methods, focus groups, and narrative research as outlined in Table A3.2.

Field-work (participant observation) provides opportunities to gain a clear picture of the research context by observing the activities and interactions within the chosen sites. This will encourage researchers to separate their observational role from that of participant (Stringer, 1996; Monette et al., 1986; Hurd, 1999; Aleman, 2001). Recordings of observations provide the detail for descriptive research

and an opportunity to explore inter-rater reliability. The observational protocols will include categories for community mapping (Elliott et al., 2001; Parks and Stoker, 1996; Witten et al., 2003).

Survey research, structured interviews, and open-ended questions will involve spokespersons nominated by the chosen sites to explore quantitative and qualitative data collection and analysis. Standardized questions will introduce descriptive statistics. Open-ended questions will explore the history and operations of the site and how the activities of the site contribute to the resilience of seniors. Open-ended questions symbolically recognize the legitimacy of the interviewee's point of view (Stringer, 1997; Monette et al., 1986).

Focus group methods build on the principles of PAR (Stringer, 1997; Berg, 1995; Morgan, 1993). Focus group participants will be recruited from the research sites. The team leaders will supervise the sessions. The protocols for each of the focus groups will tap the role of friendship, sense of common purpose, and the status associated with being part of the site.

Narrative research is emerging as central to understanding personal meaning at the deeper context of threats to personal identity (Gergen and Gergen, 1988; Josselson and Lieblich, 1993). The methods involve exploration of life stories, narrative accounts, scripts, and metaphor as theory. This technique would seem to be particularly suited to seniors as researchers since they come as peers to the experiences.

Each of the methods will be evaluated through the PAR sequence of: *engaging* seniors as participants in each of the sites; *training* the "senior" researchers in the method; *deploying* the method in the sites; *analyzing and synthesizing* the results from the perspective of each research group and then sharing results across each of the domains. The results will be then summarized and developed as a pamphlet by a communications group for *dissemination* on the Internet and in a

print form. The timelines and details of the research are presented in Table A3.3.

Quality Control specific to the research process, tools, content, and evaluation of outcomes will be the responsibility of the emeriti and the research steering committee. Validity will first be assessed by triangulating the data through multiple methods and sources of information. Construct validity of the concept of resilience is achieved through the reflexivity inherent in the structure that critically questions actions and practice. Face validity is fostered by the ongoing feedback from the larger working groups, who will also be engaged in the analysis and interpretation of the data.

The tools (measures, instruments, protocols) will be tested in the pilot and adjusted based on feedback by all involved in the PAR process.

Outcomes

- (1) A partnered new variation of action research that other researchers working with seniors will be invited to adapt and use.
- (2) A resource of trained “senior” researchers to further the research agendas of Kerby and other researchers interested in research on aging.
- (3) Tested methods, tools, and adaptations that foster research about seniors by seniors.
- (4) New field connections.
- (5) New knowledge that informs future research directions related to resilience of individuals in their social groups and communities.

- (6) Evaluated community mapping categories and processes and a list of potential sites and sources of resilience for future study.

Innovation and Originality: This pilot is original and innovative in the depth of involvement of seniors, both emeriti and community volunteers. Further, the project bridges individualist and collective PAR research approaches. Outcomes are not only methodological, the process will build a research infrastructure in the community, strengthen existing inter-sectoral partnerships and shared use of data, and empower seniors as researchers of their own lived experiences. We anticipate that the momentum generated in Calgary will encourage other communities to collaborate with us in extending the methods to create a national study of resilience.

Value of the Partnership: The strength of the partnership begins with the contributions of the stakeholders: seniors, the investigators, Kerby Centre, the emeritus professors, and the service/policy sector. Volunteer seniors who are part of the project have already made a significant commitment to deepening their research expertise and knowledge of resilience. The investigators represent a number of disciplines (Medicine, Kinesiology, Social Work, Community Rehabilitation) and research expertise (health science research, PAR, narrative research, and field-work). They come with extensive experience working with communities, consumers, and public policy. Kerby Centre of Excellence, established in 2001, is Alberta's first community-based initiative to focus on the integration of research, education, and service delivery with an overriding goal of keeping seniors healthy and aging successfully. The emeriti represent a bold innovation in research about aging. Each retired professor comes with strong academic credentials in their own disciplines (Table A3.1), research networks in Canada and abroad, and extensive research expertise. They are able to authentically animate discussions about aging from both experiential and research perspectives to the project.

Ethics: The pilot proposal is being submitted to the University of Calgary, Faculty of Medicine, Conjoint Health Research Ethics Board, and the Kerby Research Ethics Review Committee to ensure that informed consent, confidentiality, privacy, and security processes are in line with required health information policies and standards.

Conclusion: This research challenges traditional research practices that often separate seniors from those decisions that affect them by involving seniors to become skilled researchers and to play an active role in designing and disseminating research findings, exploring research opportunities for other seniors, and recruiting research students and new researchers to the field of aging.

Table A3.3. Timeline: Pilot Project CIHR–IA.

BACK-GROUND			PILOT PROJECT		
Sep.–Dec. 03	Jan.–Feb. 04	Mar.–Apr. 04	May–Jun. 04	Jul.–Sep. 04	Oct.–Dec. 04
Pre-pilot preparation	Field-work methods	Survey methods	Focus group methods	Narrative methods	Write up and disseminate
Formalize model (Figure 1)	Negotiate site involvement	Review literature on surveys	Conduct training on PAR	Conduct training	Prepare preliminary report
Recruit potential sites	Meet with research groups	Select spokespersons to interview in each of the sites	Recruit focus group participants from sites	Recruit participants for narrative interview	Pamphlets re: seniors research methods

Workshop on PAR and interviewing	Finalize field-work protocols	Finalize interview/survey protocols	Finalize protocols	Finalize protocols	City-sponsored conference on pilot results
Workshop on field-work/mapping	Each group collects data in two sites	Collect data in person, telephone or written format	Conduct focus groups within sites	Conduct narrative interviews	Recruit other research partners in other cities
Select “senior” researchers	Groups analyze data and the efficacy of the methods used	Groups analyze data and the efficacy of the methods used	Record, transcribe, and analyze results in groups	Record and analyze results individually and by group	
Groups select sites	Committee synthesis	Committee synthesis	Committee synthesis	Committee synthesis	
	Prepare pamphlet on interviewing/surveys for and by seniors	Prepare pamphlet on interviewing/surveys	Prepare pamphlet on focus groups	Prepare pamphlet on narrative methods	

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Marianne Rogerson

It seems so obvious – of course seniors should contribute to the issues and research that affect them!