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Marlett, Nancy; Emes, Claudia

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GREY MATTERS

A GUIDE TO COLLABORATIVE RESEARCH WITH SENIORS

Nancy Marlett and Claudia Emes

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Field Research

Chapter 3 introduces observing, recording, and collecting materials as the fundamental skills of all research. These are best learned in a natural or field situation. In field research the goal is to understand local knowledge and perspectives using organic methods so that the research unfolds naturally, without interference (although your presence is always felt).

For this chapter we visit the Snowbirds Fellowship in Bragg Creek, Alberta, and their oral history research.

The Snowbirds Fellowship of Bragg Creek, Alberta, was given a box of snapshots of the village and this led to many discussions about how the hamlet had changed over the years. The seniors felt it would be important to capture the history for the children and newcomers. The timing was right because their interest coincided with the Centennial of the province and there was money available for local history projects. They submitted a grant and contacted a local resident who had done biographical research to help them set up their project.

A group of volunteers held several training sessions to clarify the goals of the project, research methods that would work, and a process for documenting and saving the photos and recording the process.

They invited residents and those who had moved away to bring their photos to a photo collection day and, after obtaining consent, they recorded the details about the photos and scanned them. When they had collected the pictures they spent time discussing what they had found, sorting pictures into categories by date and figuring out what story the pictures told of Bragg Creek.

Once they had their research done and they had identified three historical periods and the reasons for transition, they contacted a local graphic artist who worked with them to present their work through computer-generated poster panels. The final product is a three-panel presentation, which travels between the schools, the Snowbirds Centre, and various events. The knowledge that the seniors held is now part of the story of Bragg Creek for all to share.

A. When Would You Do Field Research?

The ability to observe without bias, to record systematically and objectively, and to analyze what you have found enables you to understand what is happening around you. You then can make better decisions about programs, activities, and relationships. The following are examples of when you might use field-work methods:

Oral history projects are very popular and enable aging adults to research and record their shared past. Oral history shares many of the same features as writing a personal life history, but an oral history combines personal stories into a shared story.

Participatory Action Research with communities relies on the skills of observing, recording, and collecting to figure out how different people understand their situations from their unique perspectives. Field-work skills enable you to take part in events, ask questions, and

learn from what is happening in a natural way while meeting the requirements of research.

Evaluation research uses field-work skills to help you to note changes in the programs or policies you are assessing.

Ecological research looks at the impact that social environment (people, groups, networks, competitive situations) has on people's actions and beliefs. For example, the Bragg Creek Snowbirds could have studied the impact of cottagers and tourism on the ranching life of Bragg Creek.

Lived experience research attempts to document what life is like for people in particular circumstances. For example, if you are interested in what life is like in an Alzheimer's unit of a rural hospital, you might spend time on the unit with patients, observing what is happening, talking to them and carefully recording your findings.

Field-work consists of an extended period of study in a setting. We have organized the information on doing field-work according to the basic activities of all research and inquiry:

- Recruiting and orientating,
- Observing, collecting, and recording data,
- Analyzing and interpreting your findings, and
- Presenting and disseminating your findings to others.

While these activities are presented as if they occur in an ordered sequence, in reality, the steps move backwards and sideways as well as forward. The process of collecting data deepens your understanding of the setting, and, as you organize and describe what you are finding, you discover other aspects to observe.

Field-work begins with the assumption that our environments and social experiences influence whom we become. For example, you will likely see Bragg Creek differently if you are a rancher, a summer cottager, or a business person or if you live in a large estate outside the hamlet.

B. Recruiting Sites and Becoming Orientated

Finding and gaining access to situations and groups can take a great deal of time and effort. You may be lucky and be part of a group that is interested in doing field-work. You may be approached by a group that is interested in finding out more about a topic of interest to you. If not, find a contact within the group to act as your agent in arranging meetings to discuss research. If an informal contact cannot be made, you will need to approach someone in control with a formal proposal. Field-work often evolves; you start small and hope that sites will become interested.

Once you are in the setting, you will need to spend time taking in the physical setting and learning about the social environment. The following are some of the way that this happens.

Develop relationships. This may mean forming a research team or advisory group within an organization. The Snowbirds Fellowship is largely a social group that assists seniors and the community. The photo project attracted a small group of about twelve members who were interested in learning about research and producing a photo-documentary. This group was the working group for the project and shared all decisions.

Negotiate the scope of the project. The initial idea was to write a book about Bragg Creek history, but this was soon changed to focus on a photo exhibit. It was later decided to focus only on the built environment; the roads, buildings, oil wells, and fences. At each stage, the focus narrowed until the project was manageable.

Clarify roles of collaborators. Despite the fact that they knew each other, it was still important for the members to establish research relationships based on each person's skills and interests. The following segment was taken from minutes of one of the organizing meetings where each person identified how they might contribute to the project:

Karen: “I can be the bully to keep the project moving along and on track.”

Hazel: “I’ve been here for fifty years; I have lots of energy and am willing to do most anything with guidance.”

Yolonde: “I was the librarian and love to collect stories of the area.”

George took the photos of the building of the Snowbirds Chalet.

Brenda: “I am comfortable organizing and working with maps and have a computer background.”

Terry: “I know about computers and have the scanning software.”

Jacki: “I was the postmistress when the post office was in my home and was a founding member of the Artisans. I know and will work with Sig who has the majority of pictures.”

From these discussions, the following team functions were established: a. Contacting and recruiting people who had pictures, b. Interviewing people and filling out forms, c. Computer scanning of photos, and entering text materials onto computer forms. Everyone took part in the development of the data sheets, the organization of the collection of data, and the data analysis.

In field-work you meet people naturally. When you need to locate others to participate, you ask people in the group for suggestions. You can put up notices, and advertise in newsletters or local papers. In the photo project we prepared a description of the research and the

role of the senior researcher. We identified the time and involvement required and how the people might benefit from the field study.

The Snowbirds' photo documentary of Bragg Creek: We are collecting photos of our history that tracks changes in building, roads, bridges, and camps. We will scan your photos and return them, but would like to ask you a few questions about your photos. We hope to use the information we gather to produce a photo display. The photos may also be of interest to others researching Bragg Creek.

And the following is part of a script for doing phone recruitment:

I am a senior from the Snowbirds Fellowship in Bragg Creek. I am learning to collect information and will be involved in analyzing photographs. We have two researchers from the University of Calgary that are helping us conduct this research and if you have any research concerns they would be happy to meet with you. (phone recruitment 2007)

C. Collecting and Recording Information

As a participant/observer you are involved in the activities of the group you are observing. You may have been a member previously or you may ask to join for a short time. While you may not know specifically what you might find, you must declare why you are there, what you are interested in, and what you are going to do with the information.

As you participate, you become part of the group being studied. Your own reactions are part of the information you are expected to observe and record. You do this because you are a newcomer to the group and your reactions are as important as are people's reactions to you. You also do this so that you can study the impact you are having.

It will help you control your biases, your influence, and your desire to change things. While your presence may alter the established routines and interactions, you should not attempt to fix things.

As we started recording immediately on arrival, there wasn't really time to feel anything except busy. A few people made the odd friendly, basically meaningless, comment. No one seemed bothered by our activity. (NM, 2005)

When you become a participant in a group, you are working from an insider position of privilege. You have access to everyday life activities, expectations, reactions to change, and entrenched patterns of interaction and status. This information is not available to outsiders and you must honour the privilege you have.

There are many different ways to gather information. You may take minutes, collect hats, or take part in volunteer grandparent visits to a local day care. We begin this section with observation and recording, for no matter what else you are doing, it is important to record your process.

Recording that is done as part of field-work would be called "descriptive" because you are attempting to tell what is happening without opinion or judgment. Writing "everyone was interested" is a judgment not an observation. An observation might be "everyone was looking at the speaker and they were nodding silently to the presenter."

To learn how to write what you see, rather than what you think, practice recording with other seniors and compare notes. Compare and critique each other's notes to find examples of bias and judgment in order to separate your beliefs from what is happening. It is as if you are connecting your writing hand to your eyes and ears while bypassing your mind.

When observing a group, focus on each individual in the group, and notice who is not interacting. When observing individuals, try

to capture statements that seem to represent what you are observing. For example, one of the women declared in a loud voice, “why can’t people let old buildings stand when they aren’t in the way?” Make a record of statements that relate to your topic and be sure you have the date and the person’s initials so that you can use it as a quote later on.

Having a consistent format at the top of your record sheets will help you keep track of your observations. Include the date, place, observer, and activity on each page. Most researchers divide the page in two when recording. They write what they are seeing on the left side of the page and use the right side for comments and notes. A sample of an observation form that has been filled in can be found in Appendix 4.

If you are familiar with the setting and activities and have an idea of what you are looking for, you can create a shorthand set of codes to make the recording easier. There are no standardized ways of creating shorthand codes so you must be sure to record what the codes mean alongside your data so people in the future can decipher what you were writing about.

You could choose to work with a commercial observation checklist that lists the behaviours you are looking for. For example, Rudolf H. Moos has created a series of Social Climate Scales (available online: <http://www.mindgarden.com/products/scsug.htm>) that have been created from years of observing social environments and summarizing important features. An example of this type of standardized observation form would be the Group Environment Scale that provides statements about relationships, system maintenance, and change. After observing within a group, you would respond to questions such as:

When members disagree with each other, they say so.

What can you observe?

In any situation, there is much more happening that you can realistically observe, let alone record. You could record whatever strikes you as interesting but this seldom leads to useable data. You will need some guidelines so that you can train yourself to focus your observations and recordings. The following is a sample of these guidelines:

The setting and how it is set up for activities. For example, if you were in the Snowbirds Centre, you might record:

The centre is a large log structure with high ceilings and a large fireplace. At the entrance door, several people are standing by a scanner on a reception desk. There are also three desks set up to record information about pictures posted at the far end of the room. On the wall there is a large area map where a person helps identify where on the map each photo was taken. There is a coffee area where people can sit and chat over coffee and cookies. When people enter they speak quietly and follow directions to work areas.

The people in the room and their interactions: Describe the people being observed; their age, gender, style of dress, and culture.

Volunteers smile and move about. There are 6 women and 2 men volunteering today, all appear to be between 65 and 80 years old. All are Caucasian and are wearing casual clothes. Those coming to donate pictures are also Caucasian, some come alone, others in couples or with family groups.

Interaction patterns and specific interactions that are relevant to the study.

While there is an easy rapport among the volunteers and donors, they go about their business without much socializing. Each person seems to know their job and they don't ask for instructions.

Activities and behaviours: In addition to the actual activities, be sure to note who or what starts the action, who is involved, who is on the sidelines, what signals that activities are finished and how transitions are made.

I am sitting at the reception desk by the door and I am with a recorder and Terry, who is here to scan the selected photos. There is also a greeter at the door who opens the door for people and brings them to the reception desk. She also asks if they would like coffee or tea and thanks them for coming. She introduces the person to the recorder who then takes the person to one of a number of desks set up with two chairs, space to sort photos and a stack of scanning/photo information forms. They sort the pictures, choose the ones to be scanned and the rest are given back. The recorder then records the codes for the photos.

They then go to the map and place a pin where the picture was taken. There is a lot of interest in where the other pins are (noting where other photos were taken) and what the colours mean. There are still people from an earlier group and they talk about how their photos contribute to the overall picture and what else they should find pictures of. There are also some problems finding the exact location even though the map is very large.

There are several recorders waiting to take their person back to the reception desk where the photos are scanned and the originals returned. The person then is invited to chat with others or is seen to the door with thanks.

Unexpected events and peripheral activity: Describe what is happening behind the scene, comments made about what is happening, or how language is used in particular ways. What is not happening that might be expected?

There is a bottleneck by the map, which is attracting people when they have finished the process. There is now an active group that is discussing where on the map a planned new bridge should go. It is difficult to get the new people processed.

Collect documents, artifacts, and quotes: The easy part is finding things to collect; the hard part is knowing what to select from all the items that are available.

We didn't want to offend people so we took more pictures than we needed.

The following computer format was created to collect data. The photo was scanned and the information was typed into the form while the contributor watched. They then signed the release at the bottom of the form and took a copy home with them.

The Snowbirds decided to use codes for most of the information they were collecting to make the recording process easier and to ensure that nothing was missed. The codes were entered onto the scanning sheet above. The codes related to:

- The year of initial construction;
- Map location co-ordinates;
- The function of the building's environment: ranches and farms, outbuildings and sheds, camps and cottages, churches and gathering places, etc.;
- Style of construction sod/tents/lean to/log/frame.

Snowbird Seniors Fellowship Photo History Project

Scan photo here.

Description of Photo

Name _____ Date _____
scanned _____ Interviewer _____

I understand that the photo and information I have offered will be scanned and may be used in presentations about the history of Bragg Creek.

Date _____ Signature _____ Witness _____

*The year of initial construction:

pre 1930 _____ 1930- 1940 _____ 1940-1950 _____ 1950-1960 _____ 1960-1970 _____ 1970 -1980 _____
1980 -1990 _____ after 1990 _____

*Map location co-ordinates (district map 145-DF9)

*The function of the building: ranches and farms _____, outbuildings and sheds _____, camps and cottages _____; churches and gathering places _____ stores _____ schools _____ houses _____

*Style of construction: sod/tents/lean _____, log _____, frame _____, Alternative building _____

Figure 4: Sample of photo information with codes:
Snowbirds photo documentary.

D. Analyze Observations: The More Structured Your Recording, the Easier the Analysis

Once you finish your recording, read over your observations and make comments on the right-hand side of the page about ideas that need to be clarified and your ideas about what might be happening. Write a short summary of what you learned at the end of each day of recording.

When you are doing descriptive recordings, read the summaries you have produced to get an idea of the general categories that are emerging. For example, you might become intrigued by the impact that large maps have on group behaviour. Read through your recording and highlight those sections about groups at the map with a highlighter pen. If you expect to have several different categories, use different colour highlighters and mark down what each colour means.

Once you have finished this, you could read each coloured section to find out the common descriptions. For example, you may find that groups are most likely to form when they are interacting with the map – placing pins where they live, locating bridges, etc. Whatever your findings, share them with people who were present to get their ideas about what you are learning from the data and ask for their input.

Cataloging and categorizing artifacts. If you are considering creating a collection of artifacts, it is always helpful to contact your local museum staff before you start. They are the experts in this type of research and would be happy to assist you. It is almost impossible to move ahead if you don't have a clearly defined path (called a provenance) for each item – where it originated, where it was found, who owns it, etc.

Once you have catalogued or categorized your items, look at all your information and try to **find similarities and differences** that can describe your collection. You will likely have to try out a number of categories and patterns as you sort your information.

All of the scanned photos were sorted first by year and then by the types of building. We then tried to figure out the story that the photos told.

Locate quotes that describe the visual and auditory materials you have found within the categories you have created.

As we sorted we decided that there were three main phases to Bragg Creek determined by the opening of roads. We selected pictures that best told the story and included quotes that people had given us.

These methods apply to any research project where you work systematically to collect, organize, and present collections of pottery, hats, letters, paintings, children's rhymes – the sky is the limit.

If you wish to do more interpretive field-work, you might use analysis sheets such as those produced by the Education Staff of the National Archives in Washington (<http://www.archives.gov/education/lessons/worksheets>).

The following form is an example of document cataloguing that can help you to start on your analysis. You could use the same approach for any items.

Table 3. Document analysis (adapted from the National Archives, Washington, D.C.)

1. Type of document

Map

Telegram

Report

Advertisement

Government report

Census

Newspaper

Letter

Memo

2. Unique physical qualities:

Interesting letterhead

Handwritten

Typed

Seals

Notations

Stamps

Other

Notes on qualities

3. Dates of document

4. Author and position

5. For what audience was the document written?

6. Document information:

List three things the author said that you think are important to your topic.

Why do you think this document was written?

What evidence in the document helps you know why it was written?

(Quote from the document.)

List two things from the document that tell you about life at the time it was written.

What questions are raised about the document?

E. Prepare Your Presentation

This is the creative phase of your work. Information needs to be presented so that others will be interested in what you did and can understand what you found and what it might mean. Many of the projects undertaken in field-work, oral history and Participatory Action Research invite presentation to an audience. You have a wonderful opportunity to move beyond the obligatory report to the funding body and to make your knowledge sing.

You may do a pamphlet, a poem, a poster session, a video documentary, a collection, a play. Many people run out of steam by this point in the research, but it may be the most important and the most fun. You have done the research to share your ideas with others so it is important to put all your creative energies into this stage. You may be lucky enough to find a new group to take on this aspect of the research – a local playwright interested in Readers Theatre, a muralist intrigued with how to capture the vision in your work, a poet, or a songwriter. Work outside the box in thinking about your potential audiences and how to get to them.

We were able to hire a local graphic artist who took the work we had done and created three panels that were that mounted on frames. This made a wonderful display that has been to local events, the school, and the municipal district offices.

Create a story about a critical incident or situation that speaks directly to your question. Whatever your chosen technique for getting your message out, frame your work within a story. Your audience will understand your research easily when they can relate to the story.

The story of Bragg Creek is a story of how bridges brought three distinct waves of settlers: first the ranchers, then the cottagers and finally the commuters.

F. Ethical Issues and Ethics Approval

When using participant observation methods, it is likely that you are working with an inconsistent group of people. The person signing the consent form is representing the best interests of the site or program. This may cause concern within the university's ethics process, where the policies depend on individual protection and confidentiality. Most of our Kerby observation sites were concerned about why they were chosen and what information was going to be shared outside of the group.

In field-work situations, it may be impossible to keep the group's identity anonymous because the activities described are unique to the situation studied.

Ensure confidentiality if people are concerned about not being identified. On the other hand, if you are collecting heritage items, families will want to be recognized and credited with the donation. Regardless, you will need informed consent to share the ideas and things that you collect. The original consent form followed archival procedures. The consent form stated:

Thank you for participating in the Snowbirds' photo legacy project. By signing the attached form you give your permission to use any photograph donated to this project. While the intent of the project is to produce a photo exhibit for Alberta's Centennial, the material may be of interest to public archives (museums, libraries). It will be available to researchers and the public for scholarly and educational purposes including publications and exhibitions. By giving your permission, you do not give up any copyright you may hold.

I agree to the uses of the materials described above.

Even though this type of form is commonly used, it proved confusing and difficult for those donating pictures and was subsequently revised. The final version is simple and to the point and was signed at the bottom of the computer-generated information sheet that describes each photograph that was collected:

I understand that the photo and information I have offered will be scanned and may be used in presentations about the history of Bragg Creek.

Date:

Signature:

Witness:

Always test your consent form to make sure that you use plain English and strive for as short a version as possible. It is not uncommon for aging adults to refuse to participate if they do not understand what they are signing. When consent may become contentious, you will want to check the version you are using with a museum representative or lawyer.

G. Outline for Training People To Do Field-work

Ideally, you would have three class times of about two hours each. Each class would include discussion and practice. Have people read Chapter 1 of the manual before starting.

Overview

Introduce the challenge of observation as a research skill and have the group watch a video clip to see if they can recount what they have

seen. Discuss differences in what each person sees and how to separate what they see from what they expected to see.

Video clips of situations help in teaching seniors how to observe and record before moving into a practice situation. They can replay the action to observe as many times as necessary to describe what is happening. While it is difficult for the seniors to learn to watch and record simultaneously, practice with videos and data sheets will ease their anxiety.

Observing and Collecting

Share thoughts and impressions about collections.

Introduce participant observation and have each person or small group decide what to observe and the forms they will use.

Forms are included in Appendix 4.

Have them practice their observation skills before the next class.

Analysis and planning research

Bring observations to class and share findings.

Discuss how they might use observations to further their own research ideas.

Before moving to a real-life situation, make sure that the seniors have prepared, or are familiar with, a description of their role and the purpose of the study so that they can share it if asked.

Both the Kerby researchers and the Snowbirds felt that while it may have been confusing at first, learning good observation, organization, recording, and analysis skills paved the way for further research.

I felt relaxed and eager to record as much as possible. I was not questioned by any of the individuals that I was observing, but was able to share my observations with them. It was all so interesting when you see what you're really looking for.

Summary

This chapter has attempted to introduce the reader to the importance of “true reckoning” when observing. It covered an introduction to field research and how to systematically collect and organize materials. It also introduced participant observation skills, why we use observation, the researchers’ role, what to observe and how to record and analyze data. We finished with suggestions for training people to become good observers and recorders.

Resources

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