

How older people became researchers

Training, guidance and practice in action

Mary Leamy and Roger Clough

An account of a project in which older people learnt the skills of research, detailing the experiences of those involved and giving practical guidance.

Whilst it has become increasingly popular to involve lay people in the research process, the mechanics of how to do this and the accompanying benefits and drawbacks are only beginning to be examined. This report outlines how a group of older people became involved in a three-year large-scale research project, and used it as a platform to enable them to become researchers in their own right. It combines practical guidance with an account of this project, in an attempt to shed light on the realities of involvement.

The report begins by describing the development and structure of the university-validated certificate in Social Research Methods for Older People, which the project centred on. It documents the course aims, learning outcomes, curriculum content, student profile, student support and guidance, assessment and feedback strategy. The next chapter explores the practical and theoretical issues involved in teaching older adults. Written from the perspective of a novice teacher, this chapter also reveals a personal journey of learning how to teach.

The impact on the research itself of involving older people is explored – specifically, the effects on the people taking part, the effects on organisations involved, and the quality of the research. Using examples from students' course applications, the initial reasons for getting involved and prior expectations are discussed. Detailed accounts of their experiences whilst learning about how to do research and putting this learning into practice are included. The report concludes by reflecting upon the reasons for the continued involvement of older people, and describes subsequent research courses designed to respond to their desire to build upon and use their new research skills.



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Acknowledgements

In this publication, we describe the involvement of older people in research, developing from a three-year research study called 'Housing Decisions in Old Age' (HDOA), funded by the Community Fund, formerly the National Lottery Charities Board, from 2000 to 2003. The story is of a group of older people who had been involved in research becoming researchers in their own right and how they were helped to get there. A companion Joseph Rowntree Foundation (JRF) report, *Older People as Researchers: Evaluating a Participative Project* (Clough *et al.*, 2006), looks at the emergence of this group and at wider implications for older researchers. In this report we focus more on the nuts and bolts of teaching and learning.

The research team was based in two places: in London with Counsel and Care, a national voluntary organisation, and at the Department of Applied Social Science at Lancaster University. We want to place on record our acknowledgement of the support we received from both organisations. The team members have no doubt that the partnership between the two organisations, and the individuals within them, played a major part in the success of the project. Particular thanks go to our HDOA colleagues: Vince Miller, then Research Associate at Lancaster University and now Lecturer in Sociology at Kent University, who was a tutor on the research methods course; Les Bright, then deputy Chief Executive of Counsel and Care and now an independent consultant; and Liz Brooks, formerly project officer at Counsel and Care (now Research and Policy Associate). Accounts of the research, and of the involvement of older researchers, are to be found in two other publications from the research team: *Homing in on Housing: A Study of Housing Decisions of People Aged Over 60* (Clough *et al.*, 2004b) and *Housing Decisions in Later Life* (Clough *et al.*, 2004a).

Particular individuals have played their part in the research methods course. Keith Percy is Professor of Continuing Education at Lancaster University and, together with colleagues, was very supportive in the development of the original research methods course and the follow-up research network course which are referred to in this publication. Ali Cooper, Course Director of the Certificate in Learning and Teaching in Higher Education (CiLTHE) and Hilary Thomas, acting as CiLTHE mentor, both provided enthusiastic support and sound advice throughout.

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We gained a great deal from the advice that came from the members of the Research Advisory Group, representing managerial, policy and academic expertise in the area of housing for older people and the five Older People's Advisory Panels. They provided us with questions, challenges and advice and became an important focus for research team members in the planning and development of the research.

Mary Leamy was the Senior Research Associate on the project, the only full-time worker. Part of the chapter entitled 'Teaching older people to be researchers' is written in the first person, and sets out her perspective on the task. Roger Clough was the Research Director, who had developed the idea of training elders to undertake research.

Finally, many thanks to the Joseph Rowntree Foundation for acknowledging the need to disseminate practice in this area.

1 Teaching perspectives: the Certificate in Social Research Methods for Older People

Introduction

The Housing Decisions in Old Age research focused upon the housing pathways of older people, and aimed to provide evidence as to how people decide where to live in their old age and how they evaluate their decisions. The study was designed to reflect the recognition that including older people in research and policy that will affect their lives is important. We wanted to work with older people in a different way, as research colleagues rather than as advisers or research subjects. We believed that providing university-validated research training was one way of ensuring that older people with no expertise in research could develop skills as interviewers. In addition we hoped that this would lead to their research contributions being evaluated positively and taken seriously by policy makers.

The course that emerged, the Certificate in Social Research Methods, was developed specifically for the research programme and was unusual in that it was only available for people aged 60 years and over. It offered training in the theory and methods of social research, and a chance to gain practical experience in an active research project. The students received payment for each of the interviews they completed and their course fees were heavily subsidised from the research grant. Students gained an academic qualification, validated at level one of an undergraduate degree and weighted at 40 credits. They learnt research skills, which have value for paid and unpaid employment and for voluntary and community work.

The research team, based in the Department of Applied Social Science, and staff from the Department of Continuing Education (DCE) collaborated to produce the course. Whilst the course was officially owned by the DCE, it was taught by research staff, employed by the Housing Decisions in Old Age project. The course curriculum was loosely based on the Applied Social Research Methods course, currently being taught to second-year social work, social policy and criminology students. It needed to be considerably redeveloped and this is explained later, in the 'Curriculum content and sequencing' section. Two courses were run, one at Lancaster University (Spring–Summer 2001) and the other in London (Summer–Autumn 2002).

Aims

The central aim of the course was to prepare older people to become competent research interviewers. We were aiming for students from the London and Lancaster courses to complete 200 in-depth interviews with older people in their own homes, residential homes, sheltered housing and retirement communities.

The academic course aims stated:

The course will introduce research methods used in social sciences to older students so that they develop a theoretical understanding and practical interviewing skills. It will explore the ways in which social science research can be viewed as a social process and incorporate issues of ethics, responsibility and underlying power dynamics. It will consider why different research questions require different methods. The course will provide an opportunity, through experiential learning, to develop interview design, interviewing, and qualitative data analysis skills.

The intended learning outcomes were that students would be able to familiarise themselves with a range of research methods and be able to:

- select appropriate methodologies for different research questions
- design, conduct and analyse data from in-depth interviews
- manage fieldwork time-effectively
- reflect upon themselves as researchers and recognise their own strengths, weaknesses and development needs
- work effectively with supervisors.

In the course abstract, which was submitted as part of the validation within the university, we stressed the interlinking of theory and practice.

The purpose of Part 1 of the course is to enable students to become competent interviewers and enable them successfully to conduct a series of interviews during Part 2 of the course. They will be encouraged to develop practical interviewing skills through participating in experiential learning exercises involving role plays, with and without tape recorders. They will be involved in designing the in-depth interview guides they will

use and will learn how to analyse the data they collect. The main focus of this course is to provide students with the opportunity to develop practical interviewing skills.

Student profile

The students were recruited using a variety of strategies. The course was advertised in Lancaster University's Department of Continuing Education *Courses Guide* (with a circulation of 35,000) which reaches all kinds of public places, such as libraries, information centres, shops and even pubs. Other recruitment strategies included using the local press, as well as networking via voluntary organisations working with older people: Age Concern, Help the Aged, Counsel and Care. In London, Counsel and Care's press officer did an effective press release to all inner London and Greater London newspapers.

In line with the DCE's policy of open access, all older people aged 60 years or over were invited to apply. Older people on the panels raised concerns about the potential vulnerability of the people who were going to be interviewed: how could we be sure that the interviewers were reliable people to be going into the homes of older people? In the end, we developed a compromise. We thought it important that all interested students were given an opportunity to apply but gave details about the style and demands of the course. Two further checks were introduced: applicants completed an application form, stating their reasons for being interested in the course, their experience in interviewing, and thoughts about the topic. We asked them to supply two character references. In addition, we had already decided that the students would not interview people for the project until they had satisfactorily completed the first term of the course. An extract from a letter in which we asked an applicant for further information was an attempt to get the balance right.

Thank you for your application for the Certificate in Research Methods course. Having discussed it with my colleagues, we have decided that we need a little more information from you in order to decide whether to offer you a place. Anything further you could tell us about your experience in the following areas would be really helpful:

Examples of ability to relate to older people

Examples from your own experience of making housing decisions during retirement or knowledge of a friend's or relative's experiences

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Previous work history, education or training

The course is taught at the level of a university degree. Although we will do everything we can to help all students complete it successfully, we need to know more about individual students' backgrounds to know whether the course is likely to be too easy or too hard.

I look forward to hearing from you again and hope we can offer you a place.

In summary, 13 interviewers in Lancaster (eight female, five male) and nine interviewers in London (five female, four male) successfully completed the course. Of these students 19 were white, and three were from ethnic minorities (Asian, Tamil and Afro-Caribbean). At the start of the course, the mean age of Lancaster students was 63 and that of London students 67 years.

The breadth of experience which the students brought to their studies was vast. They came from:

- health and social care (e.g. GP, nursing, social worker)
- residential care/involvement with older people (e.g. housekeeper, cook, home help)
- voluntary work (e.g. prison visitor, Victim Support, Citizen's Advice Bureau, Community Health Council, Age Concern, magistrate)
- industry (e.g. managerial posts, engineers)
- public sector (e.g. librarian, tax inspector).

From their application forms, and as we got to know them socially over the duration of the course, it was apparent that many students had either faced or were facing difficult decisions regarding their own future housing needs. Some students knew of the problems vicariously, having been looking after and witnessing the problems their parents had encountered. The assessment for module 1, an interviewing skills tape, had been designed so that they could talk to their fellow students about their own housing decisions; these interviews were rich sources of data and often very moving. In fact, the reason why some of the students dropped out was directly related to having to deal with these housing problems during the course. Although we had realised that there was the potential to use the students' interviewing skills tapes as

part of the research data, we did not mention this until they did! The students were asked individually whether they wished us to use these interviews as part of the overall research data and they all agreed.

As a result of the marketing strategy and open-access policy used to recruit students, their educational level was extremely diverse, which created one of the greatest challenges for designing and teaching the course. Some of the students had left school without any higher education, whereas others were undergraduates or postgraduates. One student, for example, was completing an MA degree, whilst another student had left school at 15 years old. Both brought extremely valuable experience and knowledge to the course and their educational levels did not necessarily have a marked effect on their actual interviewing ability.

There were clear differences between students' natural ability to interview others, which may or may not be due to their prior interviewing experience. Indeed, some students who had interviewed other people in their previous careers came to the course thinking interviewing to be just common sense, an activity that anyone can do. They were likely to have fixed ideas of what an interview should be like; they wanted a structured approach with set questions that were asked in turn. We wanted to challenge these assumptions and show how complex a task interviewing is. They found it more difficult to grasp the idea of an interview that demanded far more listening, following of the interviewee and pursuit of the topic. It was only later on the course that they began to appreciate the theoretical considerations and frameworks behind different interviewing approaches.

Throughout the course, students were encouraged to use feminist research interviewing methods that are less structured, but require a higher level of skill and the ability to listen closely. They constantly needed to make judgements about whether they should hold back on discussing personal experiences or disclose them in order to encourage the interviewee to open up. They needed to be able to ask questions flexibly and respond to difficult, unexpected situations calmly and naturally. The purpose of this type of interview is to get the interviewee to tell their story and really good interviewers can often do this with remarkably little input. Some people adjust to this interviewing style more easily than others, partly depending upon their personality and usual ways of relating to people.

Curriculum content and sequencing

The sequence of the course was determined by the need to alternate sessions having a more academic, theoretical content with the practical interviewing skills

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workshops to sustain student interest. We wanted to engage the students' interest and to reinforce messages about their capacity to undertake the course. This followed not only from our view of successful teaching and learning, but also from our recognition that the whole research project was dependent on sufficient students completing the course and carrying out the 200 research interviews. So we wanted to minimise the chance that students would drop out. Given that the students were not traditional university students, we did not want to create a situation where students left the course feeling disheartened and inadequate because they were unable to cope with the theoretical aspects of the course. For some students this probably would have reinforced their initial views of universities being places that were not for them. In signing up for the course, they had put themselves on the line, being prepared to expose themselves to criticism and the possibility of failure, at a time in their lives when they did not actually need to return to education. Yet we were determined that only the students who showed that they had the knowledge and skills should pass the course. In fact only one student failed to produce an adequate first assignment.

Given the subject material, it was possible to isolate discrete theoretical concepts and interviewing techniques and present these gradually. The disadvantage of adopting this pattern was that initially it created the impression that interviewing is relatively easy, perhaps lulling them into a false sense of security. Tables 1 and 2 below outline the teaching programme. The Appendix contains a list of handouts and other teaching materials.

Table 1 Programme: module 1

Week	Activity
1	Introduction to the course and overview (Lecture and seminar)
2	Qualitative and quantitative research methods (Lecture and seminar)
3	Practical interviewing skills (Workshop)
4	Social research as a social process (Lecture and seminar)
5	Designing an in-depth interview guide for fieldwork interviews (Workshop)
6	Feminist approaches to research (Lecture and seminar)
7	Practical interviewing skills (Workshop)
8	Introduction to qualitative data analysis (Lecture and seminar)
9	Practical interviewing skills (Workshop – Group 1)
10	Practical interviewing skills (Workshop – Group 2)

Table 2 Programme: module 2

Week	Activity
1	Practice of qualitative data analysis (Lecture and seminar/fieldwork)
2–10	Group supervision of fieldwork

Student support and guidance

Tutor availability

Unlike all other DCE courses, where students only have contact with tutors during teaching sessions, whilst conducting fieldwork the older students were encouraged to contact staff outside office hours whenever they felt it necessary. As they and their interviewees were retired, often interviews were conducted at weekends and we thought it important that the students felt comfortable about contacting us if there were problems that they felt unsure about how to handle. During the course, we also made a point of turning up early and leaving later after each teaching session, as well as building in 15-minute refreshment breaks, in order to get to know the students better so they might feel able to approach us more easily. Again, we found that the groups became closer and more supportive to each other as a result of these increased opportunities to form friendships.

Peer support

None of the students knew each other at the start of the course, so we considered it important to do what we could to promote social relationships within the group. First, given our student profile and recruitment methods, we had expected that they would either be totally unfamiliar with, or at least have only a distant memory of, the demands of studying for a university course and so would benefit from sharing their anxieties with each other. Second, from a teaching and learning perspective, we thought they would be more likely to participate in the sessions if they felt secure and knew each other better. Third, from our perspective as researchers, it was also vital that the students did not drop out halfway through the course, and we hoped that if they could develop friendships they might encourage each other to keep attending.

Developing peer support on a training course was an explicit aim of Williams and Lindley's (1996) Consultancy Development project developed at the University of Kent to prepare mental health service users to 'speak out' about abuses of power within the existing mental health system. In designing their course, they were anxious to avoid replicating the situation in which many mental health users often find themselves when asked to participate in consultation exercises, namely of being expected to be a lone, unsupported voice. Williams and Lindley therefore insisted that their participants attend with someone else from the same user group and encouraged them to travel together to the course and visit each other in between workshops.

Having been impressed by their approach at the outset, we tried a number of different ways to follow their example and facilitate the development of social contacts within both groups. We built a 15–20-minute coffee break into each two-hour session, and arranged for refreshments to be provided in a different room. This was an important part of a novice teacher discovering how important all aspects of the teaching environment are in creating a friendly, relaxed setting. In Lancaster, we were lucky in having a sunny alcove in a corridor that had huge windows, plants, tables and comfortable chairs for students to assemble and chat to fellow students and teaching staff whilst waiting for the nearby teaching room to become vacant. The London venue had a café adjacent to the teaching room, which was perfect. We noticed that during the course, both groups of students arrived earlier and earlier, so they had plenty of time to chat. Teaching each session over a full day also allowed the opportunity for a long leisurely lunch!

At the end of module 1, to prepare students for conducting their fieldwork, we discussed possible safety strategies that they could adopt. For example, we suggested they could telephone a fellow student to let them know where and when they were interviewing and when they expected to return, and think about pairing up and interviewing in similar areas wherever possible. Having made these suggestions, the students then took it upon themselves to swap telephone numbers with each other. This led to many students regularly telephoning each other or arranging to meet socially during the fieldwork stage.

Assessment and feedback

The assessment tasks are shown in Table 3.

Table 3 Assessment tasks

Assessment	Description
<i>Module 1</i>	
Task 1	<i>Interviewing skills audio tape and written synopsis (equivalent to 1,000 words)</i> Students will tape-record an interview with each other about their own housing decisions for 45 minutes and write a synopsis
Task 2	<i>Lessons learnt on interviewing workshops (1,000-word reflexive account)</i> The exercise provides an opportunity to reflect on the practical skills workshops
<i>Module 2</i>	
Task 3	<i>Qualitative data analysis of two interviews (data analysis equivalent to 2,000 words)</i> Students justify their selection and use grounded theory to code six pages of their interview transcripts
Task 4	<i>Learning from fieldwork interviewing experience (1,000-word reflexive account)</i> This provides an opportunity to reflect on the in-depth interviews, commenting upon the practical considerations of fieldwork, experience of conducting interviews and upon their own development as interviewers

Giving feedback to students on their performance was an extremely important aspect of the course, so we devoted a considerable amount of time to preparing detailed, lengthy written feedback. As the class sizes were relatively small (less than 15), this was feasible. For the students, the module 1 assessment was the first time they were all able to get personalised feedback on their interviewing performance. Some had received comments from observations of their brief interviewing role plays, but it was clear from their numerous pleas in class that they were desperate for more, so on a future course we would adjust the programme to allow more opportunities to give individual feedback at an earlier stage. As a research team we were absolutely dependent upon the students producing interviews of the best quality possible; useful feedback on their work acted as an added incentive to help them improve their performance.

With hindsight

Given the importance of the interviewing task itself to the research project, the interviewing skills tape was not given sufficient weighting in terms of its contribution to the overall certificate mark. On reviewing the course, which included feedback from student evaluations, we would recommend:

- developing more formative assessments of interviewing skills to provide more opportunities for giving students feedback so that they could learn at an earlier stage precisely how to improve their own performance
- at the end of module 2, replacing either the data analysis assessment or the reflective account assessment with a fieldwork interviewing skills tape. In the latter assessment, for example, students could choose which interview they thought was their best one and submit that for marking.

They had two assessment activities which required them to engage in a process of critical self-reflection, in which they were asked to identify their own interviewing skill strengths and weaknesses and give examples from their own experience to back up these observations. The choice of two reflective assignments was perhaps too ambitious. Certainly some students found it difficult, suggesting that Cowan had a point when he observed that 'most learners don't know how to reflect' (Cowan, 1998, p. 156).

2 Teaching perspectives: teaching older people to be researchers

Introduction

Having focused upon the detail of designing and running the course, this section now takes a step back to look at some of the practical and theoretical issues involved in teaching older adults. It draws upon the personal experiences of one of the research staff, Mary Leamy, in developing and teaching a university-validated course in Social Research Methods and is therefore written in the first person.

The interplay between the nature of the student profile and subject matter, my own teaching style and relative inexperience and the overall research context of the course led to many interesting dilemmas and forced me to actively confront numerous difficult teaching issues and situations. I reflect here upon the transformation of both the older people who were students and myself from a novice into a more experienced teacher. Theoretically, the older students' transformation and experiences within higher education can be understood using Perry's (1970) framework of intellectual and ethical development.

The teacher: where I was

Novice status

Like most novice teachers, I felt extremely anxious about having to perform in public and worried whether I was up to the task of teaching, let alone being responsible for a new course, when I had relatively little prior teaching experience to draw upon. I wondered whether they would like me and whether they would find me out as an impostor. Although I enthusiastically supported the idea of developing the course, as an experienced researcher who has witnessed how easily unforeseen events can jeopardise the smooth running of a research study, I thought that we were taking a huge gamble. It was a great leap of faith for all concerned. At the same time, to improve my own academic career prospects and as a way of receiving some individual teaching support, I began studying for a teaching qualification (Certificate in Learning and Teaching in Higher Education). Although this was tremendously valuable, I began to quickly realise how much I did not know.

I had recently completed a PhD on how people with mental health problems can be empowered and was keen to apply the concept of empowerment to my research and teaching practice. At this stage I was working intuitively, applying a handful of key ideas, assumptions and values that I had picked up about teaching:

- Student-led teaching and learning is a good thing. Participation is desirable.
- A friendly, relaxed, non-threatening environment is better than the teacher being seen as a strict, formal and unapproachable authority figure.
- Patronising students is not a good strategy, whereas recognising, respecting and using students' prior knowledge is one way of building their confidence.
- Thinking about what the needs of older students might be is a good starting point.
- It would be better to be myself during teaching and, when possible, use my sense of humour and relationship with students to manage teaching situations rather than assert my power as a teacher.
- If the course is fun it is more likely to be a success.
- Being receptive to my own and colleagues' observations and student feedback and then acting upon these whenever possible is a good way to learn how to teach.

I had not stopped to think about whether these were actually correct or how they might affect the teaching environment.

Teaching preparation strategy

Initially, I overprepared my teaching sessions and severely misjudged how long it would actually take to teach anything. Practical experience quickly taught me how to timetable the session, but it was difficult to let go of the safety blanket of having plenty of material prepared, just in case. Realising that I was bombarding students with too much information and receiving feedback from students that they were beginning to find it too difficult to keep up forced me to reconsider and only focus upon the aspects of interviewing that I felt were absolutely essential. It helped to bear in mind the fundamental purpose of the course and to distinguish between the theoretical knowledge that I felt would be interesting and could slip in if there was sufficient time, and knowledge that was absolutely essential to ensure they were effective interviewers.

My position as a younger teacher

Teaching older adults on the course was further complicated by the difficulty of needing to find a way of criticising an equal. The age difference is a reversal of the situation most university teachers find themselves in. All the students were my superiors in terms of age and many of them had reached high positions in their chosen careers. I could only be sure that the distinctive feature I had to offer them was in terms of my experience and skills as a researcher and my specific academic knowledge of research. This dilemma was sharply brought to my attention during an Applied Social Science seminar when a colleague asked, 'What is it like to be teaching older people to be [researchers] like you?' The question made me realise I have faced a similar situation myself when restarting piano lessons after a 20-year gap and being taught by a recent music college graduate. I have never questioned his right to teach me because he clearly possesses the theoretical music knowledge, technical skills and musicianship that I seek. Piano playing, like interviewing, is a practical skill that has a theoretical underpinning and is about performing. Being regularly confronted with the experience of being a student myself, attempting to learn a skill that is important to me but something I recognise as challenging, and being prepared to receive criticism have affected my view about teaching. I know very well the remarkable effect carefully and sensitively worded, detailed feedback, whether positive or negative, can have. I know that, whilst welcome, comments like 'You played that bit well' do not really help, whereas specific feedback such as 'That was good because you hit the keys lightly, varied the tempo and then built it up gradually into a crescendo' means I can repeat the same performance again and know exactly why it sounded good. Equally, observations like 'I think you sight-read like a donkey' tend to stay with you for a long time.

The learners: where they were

Ageist society

It was clear that all the students were aware that older people are frequently seen in an ageist society as a burden, and some students were particularly passionate and vocal about their observations of older people being discriminated against in society. It would be reasonable to suppose that such prejudice adversely affected their self-esteem generally and had a detrimental effect upon their perceptions of themselves as learners in particular. Very early on in the life of the course, we touched on this issue. Placing newspaper adverts with headlines like 'Over 60s wanted' had a very powerful effect on students, sending out a clear message that there was someone

that recognised their skills and potential contribution to society. I think that this was a significant force in creating a positive atmosphere and was clearly a motivating factor for many if not all the students.

Motivation

The older students had different reasons for completing the course than have traditional university students. They did not see it as a qualification that would enhance future career prospects in terms of leading to a job or promotion. Some students saw the course as an opportunity to do something similar to community or voluntary work and a way of putting something back into society. Others saw it as a way of undergoing some important personal development, providing a challenge, compensating for an earlier missed opportunity to go to university or as a chance to try something very different from their previous careers. It appealed to older people who were looking to meet new people. Others described it as a way of filling a gap in their lives, either because they were newly retired or because they felt something had been missing for some time. Learning was a way of taking on a new identity and status, as this comment reveals:

The Certificate in Social Research Methods for older people had all the elements I needed to help me adapt to a new and interesting lifestyle, as I grew older. My street credibility with my younger friends is something to die for! I have discovered a new language, a new and complex subject, rediscovered my intellectual confidence and re-established my feelings of self worth. I was very much a beginner, but the effort needed to produce work for the course was a steep learning curve and my skills improved daily and with them, my choices.

Some students were not entirely sure why they were doing the course. From both a teaching and research perspective, this was slightly worrying as they were effectively an unknown quantity, perhaps less committed and potentially more likely to drop out at an early stage.

Anxieties

I was well aware of the students' inevitable anxieties from my initial telephone calls with them and from reading their application forms. Asking them to voice these concerns publicly at the first session at least gave them an opportunity to learn that they were not alone and for me to address some common concerns at the outset. At

this stage, most of their concerns were about being a student and being at university. They were worried about whether they could cope with academic demands such as using a computer, writing essays and putting in references, reading textbooks and using the library. Later on, some students privately admitted that they were apprehensive about showing their lack of education in front of their fellow students.

Expectations

Rogers (2001) describes how some people who return to education as adults are haunted by humiliatingly vivid occasions of being put down by teachers. Furthermore, their memories of being at school, where they were expected to adopt a subservient status, sitting passively and listening, also come flooding back. This is partly borne out by one student's comment about her expectations of returning to studying:

I expected the course to be academic, intellectually stimulating and rather serious, with lectures delivered as a 'fait accompli', that most of the time I would be note taking.

Although I was not fully aware of it at the time, their expectations about teaching methods were at odds with my own beliefs about the best way to learn. I held the view that student participation is a valuable, effective way of learning, but initially some of the students thought that there was little they could learn from each other and discussions were not as useful as hearing what the 'expert' teacher thought. They also were exposed to two contrasting teaching styles as a research colleague, who was experienced in giving lectures, co-taught on some of the sessions. During the initial teaching sessions, he adopted a more formal, prepared lecturing style and used overheads, stopping periodically to involve students and check they had understood the content. I was under the impression that this style was initially very popular with students and had an uneasy feeling that for some reason my authority was threatened. He was, in effect, giving them what they wanted and expected. In contrast, at least at first, they found my approach unsettling and some students appeared to reject it.

Course context

The unusual context of the course increased the pressure on students. Course participants were effectively taking on a dual role – as a student and as a researcher on an active research project. Not only did they come with anxieties about being a

student but, particularly in the early stages, they also experienced and vocalised many anxieties to do with the research itself and their role in it. For example, although they were given an initial presentation about the research design and methods, they were desperate for detailed explanations about how it would work in practice and what the timetable for the research was. Whilst wanting to share such information and treat them as research colleagues, from a teaching perspective we wanted to keep such details from them until they had been given a conceptual framework to appreciate why the research had been designed as it was. Immediately there was a dilemma between recognising they had a right, as research colleagues, to know the specific details of the research, but also judging that, from a teaching perspective, they were not yet ready for this. It became evident later in the course that sharing such information led to students also sharing our anxieties about the research process. They worried about how it was organised, whether the interview sample would be collected and whether they would develop their interviewing skills in time, as well as what would happen to the research if they failed to produce good enough interviews.

One interesting development occurred midway in the course when I was reading a student's assignment and she had written that she felt sure we were secretly conducting an experiment into how effective older people were as researchers. She did not seem unduly worried about this, indeed she actually appeared to welcome it. However, the fact that at least one student viewed herself as a research subject, in the midst of everything else, certainly left me with much to think about and slightly concerned that she did not entirely trust me or the research. Although I was surprised at the time, it is not that difficult to see why she might have come to that conclusion. I had deliberately led students to think of themselves as guinea pigs and encouraged them to be proud of this and see themselves as very special. As a novice teacher trying to run a new, rather unusual course, I had also wanted to prepare them for the inevitable teething problems.

The knowledge and learning context

Having interviewing skills as the core subject matter of the course had important implications for how the course was designed and run. Although social research methods are taught within academic undergraduate courses, it is rare for the development of skills in interviewing to be given such precedence. Course staff listened to the tapes of students' interviews, looked at the students' own reflections on their interviews and made suggestions for improvements. Rowntree (1999) has observed that the usual practice of higher education is to value theoretical and abstract knowledge to the detriment of 'lesser' forms of knowledge, for example,

psycho-motor skills. Unusually, the Social Research Methods course placed a higher value on the development of practical interviewing skills, self-development and interpersonal skills. In designing the course, deliberate choices were made to keep the theoretical and abstract knowledge about research and the nature of knowledge to a minimum.

This was clearly evident in the amount of time allocated to 'practical interviewing skills workshops' and the inclusion of assessment methods which required students to demonstrate their competence at interviewing (the interviewing skills audio tape) and self-assessment (the 'reflective learning' written accounts). The latter assessment method was an attempt to encourage students to learn how to evaluate their own interviewing performance. Again, Rowntree (1999) points out that this is unusual as it is more common in higher education for teachers to set the questions and judge whether the quality of work meets the required standard rather than encourage students to take on this role, despite the fact that self-evaluation is an important professional skill.

'Research' and 'interviewing' are words that cover a wide range of activities and skills and have many meanings to both lay people and academic researchers, so students cannot be regarded as being blank sheets. It was reasonable to assume that all students would have had some experience of being interviewed, whether through participating in market or consumer research survey interviews, or being interviewed by a doctor, bank manager or prospective employer. All of these require different styles of interview. Some older students began the course having done some form of interviewing: for example, they had worked as newspaper journalists or in personnel departments, or had collected case histories for social work assessments.

Teaching older adults about research and interviewing is partly about preparing to show them how their current understandings fit within a new, conceptual framework. This requires directly confronting students who may feel that they have little to learn or are uncomfortable admitting a need for new learning, effectively admitting something is missing.

New learning can be threatening to identity, some anxiety is involved in real learning ... real learning is about change and that is difficult.
(Rogers, 2001, p. 11)

Some students coped with this potential dilemma by secretly thinking that they already knew enough about the subject of interviewing. For instance:

It was both interesting and enlightening to be introduced to methods of interviewing for social research. Having done a great deal of interviewing in my working life [*previously a journalist*] ... I thought there was little for me to learn. But I was mistaken. I found [*the interviewing skills*] had applications for many everyday social and other activities such as listening more carefully to get the most out of a conversation, and dealing with verbal enquires or requests for help. Putting newly learned interviewing skills into practice has been both pleasing and satisfying.

Those who did admit to possessing interviewing skills still had to overcome their potential fears of being exposed as less competent than they imagined themselves to be. As there are many different styles of interviewing, it is also possible that effectiveness and competence at one type of interviewing do not readily transfer to different interviewing situations. Presenting even simple alternatives to interviewing practice, which challenges pre-existing beliefs about good interviewing, can be threatening. For example, one student had been used to conducting business interviews, which had tended to be more focused on a task than on finding out the feelings of people. He conscientiously took copious notes to enable him to be in a position to give meticulously accurate, detailed summaries of discussions. This style was not consistent with creating a relaxed atmosphere, where the interviewer gives the interviewee their full attention and encourages them to take more control over the interview. Students may find that previously held rituals and beliefs, which have never needed to be challenged in the past, are difficult to surrender.

The learners: how they got to where they are now

Perry's (1970) scheme of intellectual and ethical development provides a different framework in which to understand older adults' experiences of being in higher education. Perry constructed a scheme of intellectual and ethical development in which people move from a position of moral and intellectual absolutism, to a perception of relativism, to a position of hard-won, provisional commitment. These positions were best described as a 'main tendency' rather than as a stage which might imply a fixed duration or structure. Perry also considered it possible for individuals to regress to an earlier position if faced with a new, intimidating situation, which he called a flight from change (Perry, 1970).

The framework is useful in understanding how student conceptions of academic knowledge change throughout their studies. Perry developed the framework from analysing interviews with young, male Harvard undergraduate students who were

completing a four-year liberal arts programme. This curriculum moved from providing a general foundation in the discipline to more specialist knowledge. Under these conditions, Perry describes how 18-year-old undergraduate students begin their studies from a starting position of 'absolutism', where they have a sense of the 'authority' of the teacher and looked for 'right answers', to a second position of 'multiplicity'. In this position, students consider the teacher as someone who knows the right answers but, frustratingly, refuses to reveal them so they can discover them for themselves. In position three, students begin to consider that even though the 'authority' of the teacher might be uncertain and they question whether the teacher has sufficient expertise to know all the right answers, they still believe the truth exists out there to be discovered. As the students move to a position of relativism, in position four, they begin to consider that everyone's view about a subject is equally valid. Once the students begin to understand that the world depends upon how it is perceived and constructed, in position five, they are able to become more detached and objective in relation to knowledge. In the more advanced positions of intellectual and ethical development, the students realise that they need to make a commitment to a particular viewpoint and to orient themselves to an intellectual position.

Crene (1997) suggests that mature students may have reached more advanced positions of intellectual development than younger students, given their more extensive life experiences. They may have already developed personal 'commitments' to particular viewpoints, having reflected upon their experiences in different adult roles – perhaps as workers, parents, volunteers or citizens – or, as Perry puts it, 'having lived an examined life' (cited in Crene, 1997, p. 497). To illustrate this point, I shall describe the case of one of the older students who took the research methods course.

Chris (not his real name) was beginning to think about retiring and was working part-time when he started the course. He had had a varied business career in which he had held several top management positions. After being made redundant he decided to set himself up as a management consultant which led him to travel extensively. On retirement, he was looking for a challenge and a new lifestyle and felt that further education might provide this, although he had mixed feelings about it. He was hoping the research methods course would give him the confidence to study social anthropology at degree level. He voiced his thoughts in one of his assessments:

When I applied, I wondered, 'Would I actually have the mental equipment both to study what was being offered and, could I understand what I was being taught? Did I have the application?' By the time day one arrived, my thinking had become a little more adventurous – subject always to my

own assessment of my potential. Why not use the experience as a stepping-stone to go for a full degree course in Social Anthropology, a subject that had interested me for a long time?

He had recently volunteered to be one of the 2001 Census interviewers and was familiar with conducting survey research and quantitative sampling methods. This experience, as well as opinions he had formed as part of his management career, had undoubtedly influenced his ideas of what research should be like and, consequently, he held strong opinions that research should be scientific. He found it hard to conceive of any academic research that might be useful to society if it were not 'scientific' research and carried out in a similar way to the national census. Moreover, he was suspicious of social science's desire to be compared to the natural, 'hard' sciences and considered it was a discipline that deliberately used unnecessary jargon to create this impression and exclude lay people.

Within Perry's framework, Chris clearly showed his 'commitment' to the quantitative approach to research, despite not actually having heard of the term or been aware of the scope of quantitative research. He would not have known that research inquiry positions stem from different philosophies of social science, such as 'positivism', 'realism', 'interpretivism' and 'feminist epistemologies'. There were however, signs that he was cautiously prepared to examine other research approaches, for instance his interest in social anthropology and in interviewing older people about their lives. In Perry's terms, Chris would have to regress to an earlier intellectual position, where he learnt about the existence of different research inquiry positions and how research methods emanate from these positions, before perhaps being able to commit to a positivist inquiry position. He needed to become aware of 'relativism' and be able to weigh up and consider different theories and perspectives about research and about different ways of knowing, before committing himself to a particular position in the light of his new learning.

Appreciating that older adult learners may be at different positions of intellectual development is yet another way of understanding their diverse educational needs. It also serves to reaffirm my initial belief that older students' prior learning must be recognised and valued within the teaching environment. It means being aware of the need to run courses which are capable of providing opportunities for older students to make their own connections between their prior experiential knowledge and their newly acquired academic knowledge.

The teacher: where I am now

I believe the key to my own transformation has been the liberating, yet simple realisation that teaching is about learning. In the same way that empowering others is not about giving power to them, but rather creating a climate in which power can be taken, teaching is about designing the conditions in which learning can take place. Just as it is not possible to give power to others if they are not willing to take it, it is also not possible to do the learning for someone else; only they can do that.

I have begun to appreciate the enormous complexity involved in teaching because of the interplay between the teacher, the students, the nature of the knowledge and the wider teaching context and environment in which learning takes place. By starting to examine some of my own values and beliefs about teaching, I realise it is possible to question whether courses have been designed in the best ways to facilitate student learning and to search for the alternatives.

3 Research perspective

Introduction

Some of our reflections from a research perspective on the rewards, challenges, dilemmas, surprises and lessons learnt are available elsewhere (Leamy and Clough, 2002; Clough *et al.*, 2004a; Leamy, 2005). Lockey *et al.* (2004) carried out an independent evaluation of the training provision for service user involvement in health and social care research. This included an observation of a training session and group interviews with older people trained as part of the HDOA project.

In this chapter, drawing upon some of this material, we try to reflect upon how older people's involvement in research can be evaluated. Thornton (2000) suggests it is useful to evaluate the effectiveness of lay involvement in research in three ways:

- the effects on the people taking part
- the effects on organisations involved
- the effects on what people wanted to influence.

Effects on the people taking part

The effects upon the older people and ourselves are clearly evident in this report and the companion JRF paper, *Older People as Researchers*. We have selected only two areas to emphasise here: first, the tensions which arose from the adoption of multiple roles and, second, the development of students' confidence in their ability to make a difference on issues that matter to them.

Role conflicts

As academic researchers, we learnt how 'sharing the messiness' of the research process comes with its own problems and tensions. In establishing roles and relationships, we needed to convince students that we were credible researchers so that they would have confidence in what we were doing. This 'expert role' needed to be balanced with an 'empowering or facilitative role' where we created an atmosphere in which students felt able to challenge us and propose alternative ways

of doing things. A key benefit of involving older people in research is their ability to challenge the invalid assumptions that are made by younger researchers. This benefit is lost if older people do not feel confident enough to question the authority of academic researchers.

In setting up a university course to educate older people about social research methods we created many different roles for both older participants and ourselves.

Professional researchers' roles

- 1 *As researchers:* Our prime responsibility was to the Community Fund, the research funders. We were responsible for successfully completing the research on time, and conducting it in a way that would ensure our academic peers would judge the standard of research to be high.
- 2 *As teachers:* We also had a responsibility to, first, our students to teach in a way to facilitate their learning and development of skills and, secondly, to the Department of Continuing Education (DCE) for course design, delivery, assessment and evaluation to maintain high standards of teaching.

Older people's roles

- 1 *As students:* They took the responsibility to attend sessions, read the course handouts and other documents, complete assessed work and successfully conduct their allocated interviews.
- 2 *As researchers:* They felt the responsibility to interview as effectively as they could so they 'didn't let us down'. All the students were extremely concerned that they would not be able to deliver interviews of a sufficiently high quality for research and needed constant reassurance and encouragement. They shared the anxiety and confusion we felt in conducting an ambitious, large-scale research project – the 'emotional labour'. They witnessed and shared our frustrations when the research experienced difficulties, most notably the speed at which we were able to recruit the London interview sample and delays in giving interview feedback.

There were many occasions when we experienced dilemmas and problems which emerged from adopting these different roles. Table 4 highlights the activities that illustrate this most clearly.

Table 4 Balancing teaching and research demands

Activity	Teaching role	Research role
Supervision of interviews	To provide feedback on how to develop interviewing skills	To assess the quality of research data
Designing course	To enable students to learn at their own pace	To ensure all interviews completed on time
Designing individual teaching sessions	To enable students to design interview questions	To ensure research data responds to research questions
Student support	To provide support for all student abilities	Extra time allocated to support weaker students, possibly enabling them to retake course if necessary To ensure all research interviewers were capable of achieving satisfactory interview performance. To ensure all interviews were completed on time and academic researchers have sufficient time for other research tasks

The students when asked by Lockey *et al.* (2004) to identify an example of a particularly good training session, students selected the session where they were invited to help design an interview schedule because of its direct relevance to the research activities:

The interview schedule, writing the interview schedule, because it's such a very difficult thing to write. I enjoyed it when we had it. I thought it was a good session because we were given a rough outline of the ideas of what they wanted us to ask people when we went to do the interviews, but in fact we altered it quite considerably, this is where there was an awful lot of feedback.

Consciousness raising and desire for social action

Lockey and colleagues (2004) also asked the older students to think more specifically about the training:

I think the training and the whole group activity has cemented our belief if you like, that we can change things.

The students gained a wider appreciation of research and developed marketable research skills, which they are now using in other areas, as these course feedback extracts illustrate:

A welcome recognition that the elderly can make a significant contribution to relevant social research. Since the course I have done further research on special needs housing for the elderly relating to the local district council plan revision ... I have done further work to alert the general public to the relevance of housing for the elderly in 'bed blocking' and over-stretching community services.

I was attracted to the programme which was aimed at over 60s, offering training leading to a recognised certification ... there is life after retiring from work and many older people can still contribute to society in various ways. On completion of the course and project I would like to continue the learning curve and use the skills developed on projects of a similar nature.

Some students were beginning to articulate a need for shared social action and at times class discussions resembled a 'consciousness-raising' group. Certainly there were many occasions where the need to campaign on issues affecting older people was voiced. This was not the intention of the course, but was a recurring theme.

Effects on academic and charity-based members of the research team

We have found that, as with other examples of participatory research, during this phase of the research we were extremely preoccupied with the research process. We spent a substantial amount of time planning practical details and responding to unforeseen issues, dilemmas and challenges arising from the involvement of older people.

We were not as clear as we should have been about the exact reasons for involvement at the outset and had to work out the mechanics of their involvement as we went along. To a certain extent this was inevitable, as it is never possible to always predict what might happen when trying something new, but we recognise the importance of sharing our experience with others who might be tempted to try a similar approach.

Effects on what people wanted to influence

Clearly, what we as academic researchers and the older researchers wanted to influence was the quality of the research data. So the key question was: did involving older people within the research process lead to noticeable differences in the type of

research data collected that are unlikely to have been present had we as younger, more experienced social researchers conducted the interviews?

The key differences in the nature of the data that emerged from the interviews conducted by older people were around levels of disclosure and the proportion of the interview that was tightly focused upon the research topic of housing.

Disclosure

As we hoped and anticipated, there is absolutely no doubt that the relationship between trainee older researchers and interviewees was different from that which would have been achieved by younger researchers. As peers, they came from a similar generation and had similar life experiences and outlooks on life, as well as having a common interest in the research topic itself. They treated each other with the utmost respect and politeness and displayed impeccable manners, and a few formed relationships that continued after the interview was completed.

Their encounters frequently resembled a meeting between friends. There are many examples from the transcripts to support the view that these closer relationships did lead to both the interviewer and interviewee disclosing more about their personal lives than is usual in research interviews where there is more disparity between the lives of interviewers and interviewees.

In their own words we learnt about their behaviour, their hopes and expectations, their feelings, joys, desires and so on. Whether it was being in the same age group or not, my experiences were certainly akin to those of the feminists [*reference to Janet Finch's article on peer interviewing and self-disclosure, 1984*]. Interviewees talked very freely and were more than ready to confide in me.

(Course student)

Less tightly focused interviews

The qualitative interviewing method is designed to allow and encourage interviewees to tell their stories and give them greater control over the interview. The interviewer's role is to gently guide the discussion so the interviewee keeps focused upon the research topic. This is a very skilful, complex task and many older interviewers reported difficulties in keeping the interview focused. This type of comment was common:

... in the 'home' situation where they were relaxed and voluble the division between relevant and non-relevant became blurred. Sometimes I found it difficult to keep it all to the point and quick decisions had to be made about whether or not to continue to pursue a newly introduced topic or return to the essential thread with a verbal link.

Being inexperienced researchers, they were naturally concerned that they may not be able always to tell whether the discussion was relevant to the research topic. They reported in the supervision sessions that they didn't know what we were looking for, even though they clearly understood the broad topic area and had the interview schedule as a guide.¹ We dealt with this difficulty by spending more time in supervision sessions actually discussing the research topic of housing decisions² and, as a safeguard, advised them to allow the interviewee to continue so we could judge the relevance when listening to the tapes and reading the transcripts.

For everyone, the ultimate test of 'success' was always whether the research interview data could be used to develop theories and understanding of older people's housing decisions. We recently concluded that it could:

Sharing the research journey with older people who would traditionally only be invited to take on the roles of interviewee or questionnaire respondent, has been immensely rewarding and satisfying for us personally, as well as being beneficial for the research. It is hard to capture succinctly the effect collaborating in this way has had. Perhaps it is best to let the quality of the interviews drawn upon in this book speak for themselves.

(Clough *et al.*, 2004, p. 44)

Notes

- 1 To familiarise themselves with the research topic, as part of the course they had read the literature review, original research proposal and subsequent papers we had produced outlining the focus of the research, and watched a video from the *When I Get Older* BBC series on the subject. Some of them had even done their own searching on the internet to find out more about the housing options available too.
- 2 As professional researchers, we outlined our present understandings, gained through reading, discussions with older people's panels and professionals and our initial data analysis. Everyone also had the opportunity to listen to each other's personal experiences and their understandings of the topic developed through conducting interviews.

4 Student perspectives

This chapter is a compilation of students' writing about their experiences during three stages of their involvement in research: before, during and after. It is presented under the following headings:

- reasons for getting involved and prior expectations
- learning about research and how to do it
- putting what they had learnt into practice.

Reasons for involvement and prior expectations

As previously mentioned, following the advice we received from older panellists, we adopted similar vetting procedures to those charities use to recruit volunteers. This meant asking potential students to fill in a simple application form, outlining their reasons for applying for the course, explaining why they wanted to do research, describing any research, interviewing or other work-related experience and saying what they felt they could offer on a personal level. The information the students provided outlined the pertinence of the research topic to their own lives, their desire to pursue an educational opportunity and how they felt it offered a chance to get involved in the project to benefit others.

Pertinence of the research topic to their own lives

In many cases, their interest in the research topic stemmed from personal experience of facing difficult housing choices. Others were alerted to other people's housing dilemmas in connection with their working lives or through voluntary work.

I have natural curiosity. The acquisition of information is of great interest, though not the esoteric variety. I have developed an interest in this particular topic as a result of my work in the field – for the census. My geographical area took in two lots of sheltered housing – all comforts, but sterile. Why?

How older people became researchers

I would like to do this course because I have an interest in older people, especially in their welfare, and I feel that sometimes their needs are not always met or even considered. As a member of a team, researching on old people's housing, it would give me a chance to put their needs and requests forward.

Desire to pursue educational opportunity

Some deliberately sought out educational courses during retirement that gave them a chance to gain a qualification and/or gave them a chance to do something which was in complete contrast to their working lives.

I have always wanted to be involved in some form of research, but I have never been in the position to take or make the opportunity. As I am retiring from part-time teaching in July, this appears to be a very interesting opportunity not to be missed.

Personal opportunity and challenge as I left school aged 15 without any qualifications. Valued the chance for further education made available to the over 60 group. Important research due to longer life expectancy in UK.

This course is a pathway that leads to direct involvement in the research project on HDOA. Elderly people hardly get a chance to get involved in research of this nature and being an elderly person, I would like to make use of this opportunity. The certificate is an added attraction.

Chance to get involved in a project to benefit others

As concerned citizens, some saw involvement in research as a way of making a positive contribution to their community.

I enjoy working with people and their problems. Housing choices – making them instead of drifting – appeals particularly. Along with a number of people I know, I am facing the dilemmas myself and learning to approach and tackle housing decisions and helping others to do so could be of enormous benefit to the community and to me.

Learning about research and how to do it

Midway through the course, as part of their initial assignment, students were asked to reflect upon their experience, focusing upon their prior expectations, what they felt they had achieved so far and which areas they needed to improve. Although some of the observations described in the extract below were echoed in other students' work, what is particularly striking here is the ability to use previous insights to help understand the interviewee's inner world.

When I first applied to become a researcher, dealing with Housing Decisions in Old Age, it was with an air of excitement, on how I thought life could be made easier for the older person. One of the very first things I learnt was that the role of the researcher was to listen to the interviewee. Although I might have my own ideas on certain subjects, my job is to get the interviewee to give their views, without any bias, or preconceived ideas from me, on the subject being researched.

Having attended the classes on the theory and practice of social research, my eyes have been well and truly opened to the relevance of research work. I am hoping that my experience of working with older people will be of some advantage to me as a researcher. I was employed as a home help for social services. This meant that I had to visit people in their own homes, and build a good relationship with them as I was the 'intruder' into their own domain. I would see them when they had to admit that they were not as capable as they would have liked and so, therefore, I was seeing the real person. Also, having worked in a couple of day centres, I have listened to people discussing the pros and cons of residential care, and how they were personally feeling towards that type of housing, for themselves. Some of them have felt very guilty even about discussing the possibility of having to leave the matrimonial home. They had made their partners a promise to stay in the 'marriage' home after their husband had died, regardless of their own personal health – the guilt factor is a very difficult hurdle to get over.

I now have friends and some members of family who are either living in residential or nursing homes. These are people I visit and because, again, I have worked in both types of housing, I am aware of some of the advantages and disadvantages of these types of accommodation. I am hoping that some of this knowledge will help me to draw out the interviewee's view of their housing options and their housing decisions and as to whose choice it was that the interviewee is there and was it in their original plans.

From theory to practice

In the second written assignment, students were asked to reflect upon their fieldwork. These extracts have been selected to illustrate key areas of students' development:

- ability to manage their field relationships
- problems they faced in handling the interview and ensuring the responses were relevant to the research questions
- wider reflections about the value of social research and peer interviews.

Managing field relationships

The older researchers were sometimes suddenly faced with difficult situations where they had to think on their feet. This extract demonstrates the importance of having a sound appreciation of research ethics and learning ways of asking sensitive questions.

It was the first interview that taught me to expect the unexpected and not to have any preconceived ideas about conducting the interview. The initial contact by telephone to arrange the meeting was pleasant and friendly and I was confident and well prepared when I arrived. It was when the interviewee explained that her husband would not be able to join us because he was resting in another room suffering from cancer and would probably not live for very much longer that I knew that this was not what I had expected. I would have to adopt a role to take into account the current desperate situation that the interviewee and her dying husband were experiencing. Before starting the interview, I explained to her that I would quite understand if she did not wish to proceed with the interview, but she said that she was quite happy to carry on.

It was towards the end of the interview that the interview guide proved to be most helpful. I had summarised all its main points onto a single sheet of A4 to act as an aide-memoire. As we approached the end of the interview it would have been easy to turn a blind eye about questioning her about the future. Because I had the prompt in front of me, I knew I had to ask her about this in order to achieve a complete picture of how she saw her housing decision making, past, present and future. I said to her at the time that I realised that it might be difficult for her in the present circumstances

to talk about her future situation and this appeared to open the door for her to talk to me about it. The use of the guide at the subsequent interviews bore this experience out in ensuring that all the information requested be obtained and there is not too much wandering off the subject.

The Lancaster students were not given any advice on how to interview people who may have communication difficulties, although this was included when the course was repeated in London. One student describes the problems he faced:

An interview in a sheltered flat with a blind respondent produced a tape with reams of oral history and the interviewee certainly wanted to talk, but she could not pick up visual cues and to control her talk I would have needed to question and prompt much more assertively than is my habit. Thus she treated me affectionately, but for much of the time as a recorder of her life story, rather than as a researcher into housing decisions.

Handling the interview

The student whose observations are shown in the box struggled with practical tasks, knowing how to keep the interviewee focused and when to use self-disclosure – problems shared by many other novice interviewers. Interestingly, she chose to divide her observations into two: problems she was aware of at the time and problems that were identified in supervision sessions. (The ‘I’ in this extract is of course the student interviewer, not the course staff member.) Her writing reveals the complexity of the task, but in places she is uncomfortably self-critical about her early interviewing attempts. However, from an academic research perspective, her struggles paid off because her later interviews were exceptional and frequently used within the *Housing Decisions in Later Life* book.

Problems which I was aware of at the time

(i) Lack of confidence in using the tape recorder

Unfortunately, my first interview was completely wasted because for some reason something went wrong with the recorder and it only picked up a loud noise. After that I was paranoid it wasn't going to work. This made me so nervous about it, that I was so concerned that I spent more time on wondering if the recorder was working, than thinking about the interview. The way I tried to rectify this was to practise just before I went out so that I felt more confident.

Continued overleaf

ii) Allowing interviewee to digress from the subject

I was very aware when the interviewee went off course slightly, but I was also aware that they were enjoying it! I probably didn't focus them enough, but I felt that I was developing a rapport with them and it was probably worth it in the long run. I feel that the very sad part about these interviewees is that they actually enjoy sharing a conversation, look forward to you going and then thank you afterwards.

At the time, I tried half heartedly to bring them back on track. The next time I interviewed I found it helpful to spend a little more time at the beginning explaining about the type of interview it was going to be and what we were trying to find out. In retrospect, I should have been more firm, perhaps letting them have a little say, then guiding them back to the point, but it is necessary to make certain that this is not counterproductive to the research, in that they do not speak freely.

(iii) Uncomfortable about saying where I lived, when interviewing a person in the same village

I had planned before I went to interview this person that, if I said that I lived in the same village, he might not describe the community, shops, etc. as he thought I would know. I wasn't going to say that I lived in the village at all, but his wife came in and chatted after the interview was over and asked me where I lived. I don't think she was concerned, but I could tell by his attitude that he was not desperately happy. He didn't say anything and I might have read too much into it. I did explain why I had not said that I lived in the same village, but I felt I had been devious for the sake of the research. In retrospect, I don't think I would do the same again. I would explain that although I lived in the village, I wanted him to pretend I didn't and go into the same amount of detail.

(iv) Making interviewees think about problems they may encounter through growing older

This problem seems ridiculous as the point of the research is about age and decisions arising from it! Most interviewees had given some thought to it and those who hadn't either thought they should do, or were quite blasé about it and said they would think about it when something happened. However, one man I thought was a little put out by it. This man who had a full social life, played badminton twice a week, but turned down the offer of membership of Counsel and Care on the research newsletter, when all the other interviewees had been very

Continued

interested. This made me feel that he didn't want to know. I suppose, because he was only 71 whereas most of my interviewees were much older, that this must have made a difference, although people in their sixties or younger often consider what they are going to do. Perhaps I was being extra sensitive, but I don't think he was particularly upset, but I do think he resented me upsetting his pleasant lifestyle with the thoughts of awful things that might happen.

Problems I was totally unaware of until I read the transcripts and discussed them in supervision sessions

First of all, may I say that the transcripts give no indication of the real interview. They are very cold and do not reflect the relationship developed with the interviewee. They are in many instances boring to read, although at the time, when interviewing, they did not seem to be so.

(i) Making assumptions

Part of the time when I read the transcripts I seemed to be pre-empting what I thought the interviewee was going to say, or how they felt about something, which meant that they tended to agree with me, rather than give their opinion.

(ii) Talking too much

I was unaware until I read my transcripts that in most cases, my talking took up more lines than the person I was interviewing. I was certainly not aware of this at the time. I tried to listen more, in the following interviews, but even when I was trying not to talk, I still managed to say more! I think this is probably due to the fact that I am trying to stimulate the conversation as some interviewees need a bit more encouragement. I think I should have achieved this more by probing more.

(iii) Making more use of probing questions

Constantly, I was aware by reading the transcripts that I was missing out on asking further probing questions. However, it was unfortunate that when I went to rectify this in my next interview, I wish I hadn't bothered. My interviewee was telling me why she had left her last house and moved into sheltered housing. She explained that she found it too long a journey to walk to the shops, when later I used a probing question to see if there was any other reason, she became rather emotional and told me that her best friend had died and therefore he could no longer take her to the shops. I felt really guilty that I had upset her, but in retrospect, I wasn't to know and it was important to ask her this question.

Continued overleaf

(iv) Interrupting

I also realised when I read the transcripts that apart from talking too much, I also interrupted. I am aware I do this in ordinary conversations which is a very bad fault and, more to the point, very rude. I often do this when I think I might forget the next point I want to make. Whether it is the same reason when interviewing, I don't know. Whatever it is I still don't seem to have mastered it.

Overall, I was a little disappointed with my interviewing ability. I thought that I would have found it easier than I did. I think that it is problems in my personality which make it more difficult for me. First of all, if I am to do well at anything, I have to be prepared thoroughly. I am not terribly flexible, I find it hard to think on my feet which this style of interviewing is all about. I was unaware of some of my problems, but even when I discovered them, I still sometimes made the same mistakes. I tend to rush things, which means that I don't probe enough, as I'm anxious to get on. However, on the positive side, I did think that I was able to put the interviewees at ease, developing an atmosphere in which they felt free to talk.

Social research and peer interviewing

In the final extracts, students share their surprise about the nature of social research and try to describe how interviews conducted by older interviewers might differ from those with younger interviewers.

As a social researcher for the first time, I found that having the theoretical knowledge behind me bolstered confidence and provided a kind of relaxed professional control over the interviews. It was reassuring too to know that we were able to answer the occasional questions that came up about the broader context of the research. The term 'research' is often associated with activities well removed from day-to-day life and carried out by boffins in ivory towers. But now we know that social research through qualitative interviewing does not fit this mould. It is entirely concerned with everyday life. Thus we have been able to see how it is possible to connect with and record real life experiences in a way that truly reflects older people's feelings. In their own words we learn about their behaviour, their hopes and expectations, their feelings, joys, desires and so on. Whether it was being in the same age group or not, my experiences were certainly akin to those of feminist researchers [*a reference to Janet Finch's (1984) article on peer interviewing*]. Interviewees talked very freely and were more than ready to confide in me. I think I was lucky with my interviewees. In any event, I found the whole exercise both stimulating and satisfying.

I began to speculate that with another researcher, specifically a younger person interviewing someone older, there would be a different balance struck between straight answers to questions and their elaboration. The difference might arise from the mindset of the younger person, brought about by the appearance of age: the presumption of passivity or dependence; the assumption that the logic of physical decline is somehow mirrored in the psychology of older people themselves; the feeling that the choices older people make ought to confirm this logic. Someone said, 'Old age is an aspect that others feel!' (the others being younger people in this case). Perhaps the younger interviewer would be less tolerant of deviations from the topic.

5 From students to researchers

Overview

This reflection on the reasons for the continued involvement of the older students in research begins with accounts of several different events because the detail encapsulates important aspects of the story.

The first Social Research Methods course was held at Lancaster and at the time when that course was finishing the focus of the research staff moved to other aspects of the research: rerunning the course in London, analysing the interviews and developing a questionnaire. Indeed, the first course had absorbed far more time than had been anticipated and the research timetable was under pressure. It was at that time that the Lancaster students, most of whom had continued to meet as a group, felt abandoned by the research staff. From the perspective of the research staff, it seemed that the huge time commitment of the staff who had taught on the course had led to expectations that could not be met. In spite of what the staff thought were their best efforts, one of the London students later wrote that 'It would be nice if some one would communicate with us and not leave us in the dark'. Nevertheless, contacts were maintained: there were numerous emails in which the project team staff made suggestions to the older researchers about contacts in voluntary organisations, support for developing businesses or planning research.

At the same time there were frustrations about the mechanics of payments from the university. The research staff had intended to pay for a celebration meal at the end of the course from research funds. The students decided that they would rather provide the food themselves but did not keep the receipts. The university finance office, in line with its recently confirmed practice, refused to pay for expenditure that was not backed by receipts. There was an annoyed interchange of emails between older students and staff. Around the same time, the students were being paid for the interviews that they had undertaken. The finance office automatically deducts tax from payments unless it is instructed not to do so by individuals. Further acrimony!

Another person said, 'Why can't Finance get the message we are not young students, but responsible adults, and adapt to suit the circumstance of a new way of Adult Learning?'

(Email correspondence – report from meeting)

A meeting of students and staff from the project team and the Department of Continuing Education was held to look at what had happened. The former students made clear that they wanted another course to further develop their skills. Following that meeting a five-week short course entitled 'Research Networks' was established.

With our encouragement, the former students, now beginning to see themselves as 'novice researchers', invited one of the project team to talk with them about the viability of their group staying in existence and getting work. It was probably significant that the person they talked to was from outside the university, with experience of voluntary organisations and seeking grants.

The Research Networks course was held in the summer of 2002. One of the assignments on the course was for members to work on their own research proposal. It was a coincidence that one of the research staff knew of some real research projects that had been put out to tender during this time, on age discrimination, fuel poverty in old age and older people as researchers. In the first two, the researcher submitted proposals with the active support of the older, novice researchers. The intention was that the procedure should be reversed with the third tender: the novice researchers were to work on the bid, with the support of the research staff. This did not happen.

And so a tender was submitted in the name of an academic member of the project, again with the support of the older researchers. In the submission, it was acknowledged that this was not what had been planned but that it had become apparent that the task was harder than had been anticipated. The tender proposed ways in which the older members would develop their own skills while undertaking the research. This submission to the Joseph Rowntree Foundation (JRF) was successful; the others were not.

During the life of the JRF project the novice researchers established themselves as a co-operative consortium, Older People Researching Social Issues (OPRSI). They became known through their own efforts, through reports on the original housing decisions research, and through further research submissions with members of the original project team.

And so an idea of involving older people more fully in research has led to the establishment of a group working in social research. It is an essential part of this story that this had not been envisaged with the original project. Indeed the development of a validated university course in research methods for older people, rather than simply training people to undertake interviews, had only come about because the research director had discovered that the director of the Continuing Education department had been a former editor of *Education and Ageing*.

In the rest of this section we reflect on the events. Given that we had not planned that the original project would lead to employment for older people in research, we have no means to gauge the likelihood of success if there were a deliberate attempt to link a course to future work. Another perspective is to see the development of research skills as part of lifetime learning, akin to any adult education class.

Indeed, for some the investment in learning new skills in research is a part of wanting to influence and change their worlds. There is potential for continuing links with universities, though students may want more contact with staff than comes from traditional continuing education classes.

Developing skills and confidence

Learning by doing has been one of the key factors in the development of OPRSI members' skills and confidence. Working on real projects has created demands and responsibilities, but had immense rewards. Without the link to people who were actively seeking research funding it is likely that the group would have grown in different ways and directions. The early support and advice from project staff have also been important.

It is not easy for starting researchers to assess their competence. They may underrate what they do, and think that finished reports are produced without the struggle that academics know they take. They may need to:

- understand the context of social research
- assess their individual and collective capacities
- develop new skills
- establish themselves as people who are capable of undertaking research work.

As we discuss in the companion JRF report all researchers face problems, and for those with limited experience of research, outside an academic base, they may seem to have no boundaries:

- getting to understand the nature of research
- the difficulty in finding interviewees (in spite of every effort being made by every conceivable method)

- understanding the task of a literature review and completing it
- discovering that a lot of material produced is in the form of in-house reports, which are not available through libraries, nor recorded on databases
- getting the use of university libraries and getting copies of articles
- developing skills in the art of writing: producing a report on a project – selecting key points, constructing the framework, writing the material
- developing and writing up future proposals
- developing as a business: for example, sorting tax and insurance, or the status of the business
- creating and managing a timetable for a project
- working out what has to happen for an organisation to stay in existence and developing the key skills.

Successful organisations will develop ways to assess the quality of their work. This is important also for those who want to establish credibility. They will have to decide about eligibility to membership of their group: they need to ensure people are reliable as they will be interviewing people in their own homes; and they have to ensure that they are competent, with sufficient research skills.

Minutes from an OPRSI meeting capture members' thinking about their future:

The topics interest us, so we want to go with Roger and take advantage of the learning on the job that participation will allow us. There are two choices of course, the other is to say we are looking for work only as interviewers, and these projects are outside our scope. None of us seemed to be saying this.

The later research courses

As we have noted, two further courses were held after the end of the Certificate in Social Research Methods for Older People: the first of these was called 'Research Networks'; the second, 'Research Skills for Older People'. Both courses had two sessions per week over five weeks, with additional assignments. Both were open to

any applicant over 50, but the bulk of the attendees were the former research students.

Research Networks

The course was constructed after discussions with the group of older students. The programme, set out below, was designed to open up the world of research, to get members involved in thinking about their own research interests and in writing research proposals. The title of the course attempted to capture not only discovering more about existing research networks but also the idea of establishing a network of older researchers. We achieved the first on the course, but are still working on the development of the latter.

In the course we aimed to try to get beneath the mystique of research, to look at power relationships and to see how people who have been outside research might come to influence what goes on.

An Older People's Research Network?

June–July 2002, 10.00–12.00

Programme

Session 1 What determines the current research agenda concerning later life?

Introduction to course

What are the emphases in current research in our society on older people and later life? Who decides those emphases and for what reasons? What parts could older people play in deciding what research should be carried out and the use to be made of research outcomes? What are the limitations of research?

Session 2 Research and key decisions on social and health policy affecting older people

How are key decisions on social and health policy made? Are such decisions made on the basis of research findings and, if so, what kind of research and what difference does it make?

Research and its interaction with politics: the current debate over the proposed closure of Lancashire's residential homes for older people – a case study.

Continued

Session 3 Older people as researchers

Older people as decision makers about, and consumers of, research. What are research skills and how can they be acquired? What use are such skills to older people? The experience of older people who have acquired research skills in later life.

Session 4 Current research projects in the North West related to later life and older people

A review of current major publicly funded research activity in the North West and an opportunity to assess its merits from the point of view of older people and from perspectives derived from the course so far.

Session 5 An Older People's Research Network? Review and next steps

The notion of a research network of older people. Is it possible? How would it work?

How can we set about creating a research agenda relevant to older people?

Review and summation of the course. An assessment of the research skills which older people can acquire and how they might use them. A review of how older people might be more effectively involved in all areas of research into the social practices and policies which affect them.

The details of two assignments capture the practical focus:

- 1 A national voluntary organisation wants to submit a research proposal, in conjunction with an academic institution, to study age discrimination. The organisation has sent a research outline out to a few academics asking whether they are interested in becoming a research partner and, if so, to present some key points as to the reasons why that academic partner should be adopted. This is a live document which has come to Roger Clough. He will not use any ideas you produce without your authority, but is interested in ways in which any of you might be able to play a part in the research. He does intend to submit an expression of interest, which will be submitted in his name.
- 2 The task is to try to develop one idea for a research project. You are being asked to note down your current ideas – not to write a sophisticated research proposal. You may choose one of the topics discussed in the first week, or choose a different one. The sheet is meant to be a working document in which you start with your first thoughts and develop them as you work down; so you are not meant to think everything through before you start writing.

Research Skills for Older People

This course, held in the summer of 2003 as part of the JRF project 'Older People as Researchers', again was designed to fit the interests of a group of older researchers. The course programme, with learning outcomes and assignment, is set out below.

Older People as Researchers: Potential, Practicalities and Pitfalls

Developing research skills

Sessions

April 28th	Developing a research proposal (1)
May 12th	(i) Telephone interviewing (ii) Qualitative data analysis revisited
May 19th	Developing a research proposal (2) Assessing research proposals – extracts from research assessment criteria of different organisations Further work on individual or group research proposals
June 2nd	(i) Setting out your stall (ii) Developing a research proposal (3)
June 9th	Construction of an interview schedule

Learning outcomes

At the end of the course, students will be able to:

- consider and describe the experience of developing a research proposal
- prepare a draft research proposal
- develop research skills in specialist interviewing and in data analysis.

Assessment task

The task is meant to be straightforward and use the work you are doing during the course. Assessment will take the form of notes written to the title 'Reflection on writing a research proposal'. The assignment produced should be 2,000–3,000 words. It may be in one continuous document or in a number of shorter documents produced in different weeks. It may be written in note form. The assignment is the reflection, not the proposal itself. However, you may refer to

Continued

the proposal. For example under the heading 'Research focus' below you could write about the experience of trying to define what you want to study. So you could discuss what you started with wanting to look at and the way you narrowed down the topic.

Headings you may want to use in producing the assignment. You are free to develop your own headings.

- *the research focus*: the topic you want to consider – the original idea for the research; personal interest; prior personal knowledge; importance of the topic; this could be called 'the research journey'
- *the research questions*: the questions you want to consider; the questions you will have to exclude; is the project manageable?
- *dilemmas in undertaking the research*: practicalities; ethical considerations; problems to be solved
- working out what the funding organisation is looking for
- collecting background information
- *methods*: the consideration of different ways of studying this topic; pros and cons of different methods; initial ideas as to how to proceed
- *outcomes*: to show that you have produced what you promised
- *scale of the research*: time; numbers of questionnaires/interviews; numbers of person days on different activities
- *further reflections*: importance of the topic; narrowing down and focusing.

In the discussion of the original research methods course, we have made the point that the focus was on helping people develop skills: theory is essential to understanding the nature of the activity, for example of interviewing; but learning how to interview, to use your head knowledge, is an additional dimension. The students themselves, and the course staff, studied the students' practice with the explicit purpose of helping people improve their techniques. The aim on this course was to do the same task in more abstract areas. We had become aware that many of us had learnt how to carry out tasks such as writing research proposals without having consciously been faced with the questions:

- What is it that I am trying to do in this research proposal?
- How am I going about it?

How older people became researchers

■ What are the skills involved?

There has been a growth in helping people prepare for job applications, but very little on development of these skills. So our task was to spell out the requirements of the activity and then to help people practise working on their own proposal. One proposal was developed on the course by some course members and submitted to the NHS. It was rejected but the OPRSI members were encouraged by the feedback they were given, which included the following:

- Good understanding of the need for this research but proposed method is not clear.
- The group has a good understanding of user-controlled research – including of potential barriers, e.g. perceptions of user-led research not being of good quality.
- This proposal reads like a list of (many good) ideas rather than a fully worked proposal. The other projects that this team has worked on seem to have involved academic supervision, and I wonder whether the team is not yet ready to tackle projects such as this independently.
- I feel this group is interesting and grounded in a user-led model, but lacks wider experience of research, as well as the understanding of diversity and of the social model necessary to ground this research effectively.
- I like the sound of this group. They are enthusiastic and obviously work in a democratic and empowering way. I liked the way they wanted to include the voice of under-represented groups. Also, they said they would be sending out reports to all the research participants. Good! That's valuing the part people played in the research process.

We attempted a parallel exercise with the topic of publicising one's availability: how were the older researchers to become known to a wider audience? Once again we reflected on our own experience of wanting work as independent researchers, but not enjoying the activities of networking and marketing. We called the session 'Setting out your stall'. It was led by Les Bright, one of the project team.

Setting out your stall

What have you got for sale?

What's special about it?

How do you know?

Continued

Establish your value base

Agree key principles: what you're prepared to do
... and whom you'll do it for

Know your potential purchasers

Differentiate between purchasers
Understand what's important to them

Get on the 'inside track'

Subscribe to/read relevant magazines/journals
Scan the web: identify key sites – and then visit regularly

Consider writing letters to the editor

Responding to articles or other correspondents
Consider generating new streams of correspondence on topics *you* think are important

Learn the language

Don't mimic it, just know it!
Use it – when necessary or desirable
But don't feel coerced into false presentations that can't be backed up

Pay attention to detail. Do you have –

Insurance: public and employer's liability?
Policies: equal opportunities, disability discrimination, confidentiality?

Develop ways of dealing with 'fishing trips'

But be able to discriminate from those who want help to frame ideas
Agree internal procedures for non-earning activities

Set high standards

Invite others to evaluate your work
Use that evaluation to promote your work

Publicity is a vital and little-developed part of work in social research. OPRSI has become known in part through the placing of short articles in professional journals or those of voluntary organisations. The articles were mostly written by a member of the original Housing Decisions team with extensive experience of getting publicity for a voluntary organisation. We think that this has been important in OPRSI getting known, and has led to invitations to them to participate in one-off events or wider projects. It has been valuable in helping to maintain their momentum.

Reflection

In part this is a story of serendipity, of older people recruited for a specific project for various reasons deciding to develop their skills more generally as researchers. It is also an account of learning by doing: of discovering how to interview, and what research is, from the process of undertaking research. Learning by doing does not necessarily mean that people discover only from their own activity. In this study, the students also learnt from theory and from experienced researchers. Both of these offered frameworks for looking at the task of research, together with ways to understand the process of the activity. This style of learning and development of skills is enhanced by the quality of the research experiences. We think the importance of the research interviews in the life of the project heightened the students' involvement in the research, and in their own development of skills.

There are exciting opportunities for older people to discover new activities and learn new skills. We hope that this will be one of many accounts of ways in which older people become more active in research and, indeed, share their experiences of learning about research with other older people.

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Appendix: List of handouts for the Social Research Methods course

Table A1.1 Background handouts

No.	Background handouts
1	Original grant proposal
2	Counsel and Care information sheet
3	Briefing paper on focus of research
4	Draft literature review
5	Interim progress report to Community Fund
6	Discussion paper on Housing Decisions
7	Briefing paper on Housing Options for Older People
8	Important course information (DCE course overview and reading list)

Table A1.2 Specific handouts to accompany sessions

No.	Specific handouts to accompany sessions
<i>Module 1</i>	<i>Week 2. Overview to qualitative and quantitative research</i>
9	The research process
10	What are the different kinds of research methods?
11	Research methods course glossary
12	Qualitative research
13	What is the purpose of social research?
	<i>Week 3. Practical skills workshop 1</i>
14	Interviewing structure
15	Micro interviewing skills
16	Non-verbal skills exercise
17	'Good interviewing is like unpeeling an onion'
	<i>Week 4 & 6. Research as a social process/feminist approaches</i>
18	Janet Finch article 'It's good to have someone to talk to'
19	Ethics
20	Hilary Graham article 'Surveying through stories'
	<i>Week 5. Designing interview schedule</i>
21	Question design
22	Designing interview questions – exercise instruction sheet
23	HDOA interview schedule
	<i>Week 6. Practical skills workshop 2</i>
24	Recording data
25	Building relationships
26	Anticipating problems
27	Good practice when asking sensitive questions
28	Initial questions from interview (Section 1. Deciding where to live)
<i>Module 2</i>	<i>Week 1</i>
29	Theory of qualitative data analysis
30	Practice example for open coding exercise
31	Information pack and leaflet for interviewers
32	Checklist for interviewers
33	Safety issues whilst interviewing

