A Successful Strategy for Recruitment and Retention of Black Elders in Applied Research

Galyn A. Vesey, Associate Professor, Graduate Social Work Program, Alabama A & M University

Introduction

Methodological issues concerning research on older individuals have been subjected to scientific scrutiny for over thirty years (Herzog & Rodgers, 1982; Markides, Liang & Jackson, 1990; Patrick, Pruchno & Rose, 1998; Pihlblad, Rosencranz & McNevin, 1967). Less emphasis has been devoted to problems of planning, design and execution of studies on older ethnic minorities (Markides, Liang & Jackson, 1990; Smith, 1987). Even when methodological questions associated with the principal subjects of this paper, black elders, have been addressed, investigators have been motivated primarily by their own research interests (Burton & Bengtson, 1982; Colen, 1983; Colen & McNeely, 1983; Jackson & Hatchett, 1986; Manuel, 1982; Markides, Liang & Jackson, 1990; Smith, 1987). This has resulted in a research practice of **planning for** rather than **planning with** black elders and their communities (Binstock, 1967; Downing & Copeland, 1980), and therefore a potential barrier to black participation in research (Levkoff, Levy & Weitzman, 2000).

Barriers to Black Involvement in Research

A cursory review of gerontological studies indicates that, historically, the majority of these investigations have been limited to all or predominately white samples (see for example, Hanson, Sauer & Seelbach, 1983; Karp, 1989; Krout, 1988; McCormack, 1971; Moen, 1995; Mutran, 1985; Smith, 1987; Vesey, 1994). Jackson and Gibson (1985) suggest that there may be a lack of research interest in ethnic minority life experiences and retirement processes (National Institute on Aging, 1985).

Another factor which may have an adverse effect on black participation in gerontological research stems from the questionable reputation of some research institutions that conduct formal inquiries in black communities (Becerra & Shaw, 1984; Sinclair et al., 2000). Reluctance to participate in formal inquiries may be particularly evident if past research experiences of older blacks were unfavorable, or if the research purposes and outcomes were perceived as being irrelevant to the black community (Burton & Bengtson, 1982; Downing & Copeland, 1980; Levkoff, Levy & Weitzman, 2000; Markides, Liang & Jackson, 1990; McNeilly et al., 2000; Sinclair et al., 2000).

The central issue here seems to rest, in part, on the concept of community trust or the

lack thereof (Brown, 1997; Jackson, 1997; Levkoff, Levy & Weitzman, 2000; Levkoff, Prohaska, Weitzman & Ory, 2000; McNeilly et al., 2000), suggesting that "given the historical events surrounding the role of research in the African American community," . . . investigators "may be required to counter attitudes of fear and mistrust . . ." (Patrick, Pruchno & Rose, 1998, p. 296).

Patrick, Pruchno and Rose (1998) cite the importance of coalition building and networking in efforts to establish trust between the research institution and the community under study. For the most part, however, investigators have failed to utilize community organizations and networks in the black community for research purposes (Sinclair et al., 2000). Burton and Bengtson (1982) suggest that the decision by researchers to not consult with black constituents about research plans in the black community is a serious issue to community members. Moreover, they assert "that community involvement in the entire research scenario is essential to developing an atmosphere that is conducive to research . . . Yet many researchers either underestimate or deliberately ignore the concerns, as well as the powers, of the communities and their advocates" (Burton & Bengtson, 1982, p. 220; Pinn, 2000).

On the other hand, the long storied existence of formal research includes a history of partnership and collaboration with the white community (Levkoff, Prohaska, Weitzman & Ory, 2000). Consequently, relative to whites, blacks are less likely to volunteer as research participants and they are less likely to be asked to participate (Markides, Liang & Jackson, 1990). Nonetheless, the absence of black community involvement in research could be addressed, initially, by the nature of the study design (Markides, Liang & Jackson, 1990; Pinn, 2000), and secondly (evolving from the study design), by meaningful involvement of individuals, groups and organizations, from the community under study, in the overall research process (Burton & Bengtson, 1982; Levkoff, Levy & Weitzman, 2000; Patrick, Pruchno & Rose, 1998; Sinclair et al., 2000).

Black resistance to participate in gerontological research may be further magnified by cultural differences between the investigative team and potential respondents. For instance, a culturally and racially incompatible staff may serve to reinforce the discomfort that many blacks feel about participation in research studies (Becton & Brown-Glaude, 1997; Levkoff, Levy & Weitzman, 2000; Markides, Liang & Jackson, 1990; Sinclair et al., 2000); and contrary to mixed race-of-interviewer effects found for black respondents by Anderson and associates (1988), Becton and Brown-Glaude (1997) report that black elders are more likely to expound on sensitive questions asked by black interviewers.

These researchers (Becton & Brown-Glaude, 1997) conclude that the process of gaining, building and maintaining trust with the group under study is facilitated when the interviewer and respondent are from the same racial group. Hence, in many instances,

race matching could promote a positive, informalized relationship between the research interviewer and respondent (Anderson, Silver & Abramson, 1988; Bradburn, 1983; Markides, Liang & Jackson, 1990; Sinclair et al., 2000).

The past few decades have seen an increasing interest in the question of black recruitment for research participation (Jackson, Tucker & Bowman, 1982; Jarrett, 1993; Levkoff, Levy & Weitzman, 2000; Patrick, Pruchno & Rose, 1998; Sinclair et al., 2000; Vesey & Pillemer, 1998). In other words, how can the research community develop and deploy strategies for recruiting and retaining black elders in health and social research activities? This question is highlighted as one of the primary objectives set forth by the National Institute on Aging (NIA) in the NIA's recent Request for Applications for Creation of Resource Centers for Minority Aging Research[1] (National Institutes of Health Guide, 1997). The Journal of Mental Health and Aging (Vol. 6, No. 1, Spring, 2000) recently published a special issue on the topic of recruitment and retention in minority aging research. These undertakings suggest that recruitment of blacks for aging research is clearly a national priority (Pinn, 1994, 2000).

Aside from a few recent exceptions (Levkoff, Levy & Weitzman, 2000; Sinclair et al., 2000), previous studies have stopped short of presenting a definitive recruitment strategy; that is, a systematic plan for increasing black acceptance and participation in gerontological research (Patrick, Pruchno & Rose, 1998). For example, Markides and associates (1990) suggest that blacks could be recruited for research by utilizing formal community advertising (e.g., news publications, mass media) and informal awareness campaigns (e.g., churches and businesses in the black community).

Downing and Copeland (1980) point out that traditional modes of mass communication may be ineffective in reaching many, if not most, black elders. Traditional methods of communication tend to be impersonal and foster an assumption that blacks have access to such media outlets. Also, it is not entirely clear how informal awareness campaigns would be used to recruit black research participants.

Because of limitations that may be imposed by solely using formal or traditional recruitment strategies (Patrick, Pruchno & Rose, 1998), several investigators have suggested informal methods of recruiting nontraditional or "hard to reach" respon-

[1] As an illustration of one resource center for minority aging research, reference is made to the Michigan Center for Urban African American Aging Research (MCUAAAR), which funded the seminal work of Dr. Donna L. Cochran, who used focus group methodology in her pilot project entitled: "Identifying Strategies for the Recruitment and Retention of Older African Americans in Epidemiologic, Clinical and Psychosocial Research" (unpublished).

dents, such as black elders, that are based on direct person-to-person contact (Downing & Copeland, 1980; Jarrett, 1993; McNeilly et al., 2000; Sinclair et al., 2000; Vesey, 1995, 1998; Vesey & Glasgow, 1995; Vesey & Pillemer, 1998). Jarrett (1993), for instance, applies a personalized study approach in drawing a sample of low-income black females. Patrick and associates (1998) found a modified demographic sampling unit approach, featuring a personalized invitation for research participation, to be an effective recruitment strategy among older blacks. Similar to the overall recruitment strategy applied in this research, these authors (Patrick, Pruchno & Rose, 1998) conclude that it could be beneficial to use a variety of recruitment strategies at the start of the research activity.

Also, there is evidence that personalized recruitment strategies can be enhanced by training indigenous researchers who are especially sensitive to black cultural perceptions, issues and idiosyncrasies (Downing & Copeland, 1980; Jackson, Tucker & Bowman, 1982; Manuel, 1982; Markides, Liang & Jackson, 1990).

Research Questions and Objectives

An underlying assumption of this study is that overcoming potential barriers to black research participation is of critical importance to future studies on black aging, retirement and well-being. Hence, this research aims to present a working template that could be used in developing a systematic strategy for recruitment and retention of black elders for gerontological inquiry. As such this research seeks to add to the social science knowledge base on use of community resources in planning and designing research on black elders, and primarily using a personalized study approach.

Based on a review of a useful but limited body of available literature, the following questions emerge in this research: How can support for research on older blacks be generated from eligible persons of the group under study? How can trust be established with members of the black community so that they will be supportive of research activities? How does the investigator design the research project to meet community-defined needs? What are the best ways to disseminate the research findings to the community under study?

Methods

As part of research conducted by the Cornell University Gerontology Research Institute (CUGRI), a personalized study design was developed to create innovative strategies for involving ethnic minority individuals and their communities in applied research. The personalized study design was used as a strategy for recruitment and retention of ethnic minorities age 65 and over, in two studies conducted in upstate New York between 1994 and 1995.

The first study examined mobility patterns and travel barriers among black and Native American elders using focus group methodology. The second study applied survey research methodology to examine retirement and well-being questions in a purposive sample of older blacks. The analysis in this research is limited to the black participants. Because the strategies employed for recruitment and retention of individuals and communities in both studies were very similar, the ensuing discussion consists of an integrated description of the overall strategy used (unless it seems appropriate to mention a specific research activity). Results of both studies are reported on by the principal author elsewhere (Vesey, 1995, 1998; Vesey & Glasgow, 1995).

Strategy for Recruitment and Retention

Phase I: Conceptualization, Planning and Development of Study Materials. The initial phase of the strategy for recruitment and retention consists of the following activities: (1) a description of the research problem, research design, method of sampling, data gathering and measurement; (2) construction of study materials; (3) a plan for using community resources including volunteers, and a plan of the method and time frame for making community contacts; and (4) a work plan and time frame for drawing the study sample (including a pretest for the retirement survey), the method of contacting and conducting interviews, the method of gathering, coding and entering data, and the method of analyzing, interpreting and reporting study findings.

The research problem and study design for the transportation study was adapted from a larger CUGRI study (Glasgow, 1994). A modified focus group guide instrument was adapted from the parent study (Glasgow, 1994) to facilitate discussion and interaction among black participants in the transportation study. The purposive guide used open-ended questions to avoid unintentional moderator bias and to facilitate free and unintimidated participant discussion (Krueger, 1988). The length of each focus group session (N=3) required about 90 minutes for completion, and each session was audio recorded for transcription.

The retirement study was also adapted from a larger CUGRI study (Moen, 1995). A modified retirement study instrument was developed in a manner to reflect cultural sensitivity to black respondents, and at the same time, to gather the most information-rich responses possible. The retirement study instrument contained both closed-ended and open-ended items and required approximately one hour for completion.

Phase II: Contacting and Utilization of Community Resources. In this phase of the research activity, the investigator developed and contacted a list of community volunteers to serve on an Honorary Sponsors' Advisory Committee (HSAC). The HSAC was comprised of social agency, church, professional and lay representatives.

The majority of HSAC members were black, both professional and lay persons, from two communities targeted for research activity. The HSAC was particularly indispensable to this research because of the expertise each member brought to the project. Hence, the HSAC represented a broad cross-section of individuals including those who were visible in the community and accustomed to leadership roles, those who were less visible in the community but who were knowledgeable of or interested in community interventions designed for black elders, and finally, others who were residents of or practitioners serving one of the two communities under study.

The HSAC assisted the research staff in reviewing study instrument materials (and making suggestions for necessary revisions), reviewing the research objectives, and reviewing the plan of study implementation and reporting. Additional activities executed by the HSAC include: (1) made referrals of potential participants to the research staff; (2) disseminated information and solicited community support for the project; (3) reported feedback from the community to the research staff; and (4) accepted leadership roles during combined community meetings and research staff presentations.

As shown in context of the above descriptions, HSAC activities were designed to assist in meeting community-defined interests, and HSAC involvement in this project was consistent with the conceptual scheme and planning outlined in Phase I activities.

Because HSAC members were recruited from two communities, research staff contact was facilitated by an initial formal organizational meeting, and periodic smaller meetings in both communities, plus regular telephone, mail and individualized contact over the course of the two-year project.

In addition, university students were recruited to assist in implementing this research project through receipt of educational credit and/or work-study assignments.

Phase III: Contacting and Interviewing Study Sample. Because of the relatively small samples in both the transportation and the retirement studies, a mixed purposive sampling strategy was applied, which permitted creation of information-rich cases generated by four different types of sampling strategy: (1) criterion sampling; (2) typical case sampling; (3) homogeneous sampling (used primarily in focus group construction); and (4) snowball or chain sampling (Patton, 1990).

An additional rationale for applying a purposive sampling strategy in the retirement study stemmed from the unavailability of local census information, or other appropriate data sources from which a representative sample could be drawn, in the geographical area selected for study. Of course this is not an uncommon occurrence in

local community studies or studies that recruit black respondents (Richardson & Kilty, 1989, 1992; Smith, 1987).

Although the approach used in this research project followed conventional practice wisdom in some respects (cf. Krueger, 1988; Morgan, 1988; Richardson & Kilty, 1989, 1992), a deliberate effort was made to adapt a more personalized strategy (Jarrett, 1993) of recruiting black participants. This strategy was based on activities outlined in Phases I and II and therefore, collectively, these strategies are considered to be crucial to the success of the overall research project.

The principal strategy used in gathering names of potential research participants was based on referrals made by key community informants (members of the HSAC in addition to other community sources), who consented to make initial contact with potential participants to solicit tentative interest in this project. A secondary strategy used in collecting names of potential participants was based on research staff referrals.

The list of potential research participants included the following information: first and last name of each individual, the person's address and zip code, telephone number and area code, and age or date of birth. Alternate names and telephone numbers of relatives or friends were used if the person did not have a telephone, or if it was necessary to contact adult family members.

The initial (or the second in some instances) contact by the research staff with potential participants resulted from either informant or staff referrals. The purpose of this contact, which was generally made by telephone, was to explain the purpose of the research and to request participation in the project. Given a favorable response, this effort was followed by a personalized letter to each person formally requesting his or her participation in the research project.

Occasionally, the research staff executed this process by personally delivering the letter to the person's residence; which served to both permit an introduction of the research staff member and promote a sense of personal security (staff member presented university identification). The letter included a brief statement of the research purpose and ground rules, and information concerning the date, place and time of a focus group session or a personal interview (if a date was scheduled during the staff's initial telephone contact). A final telephone call was made to each prospective participant confirming participation in the project, one day prior to the focus group or personal interview.

Focus group sessions were conducted in community centers and a senior housing center. Each site was centrally located in the black community or reasonably acces-

sible to project participants. Retirement study interviews were conducted in either the respondent's residence or a local social agency per arrangements made by the research staff. In-kind support of the project was obtained through research staff coordination with social agencies, for participants who required transportation. A small honorarium was provided for participants in the transportation study via nonresearch grant funds authorized by the university. Monetary payment for research participation is a customary practice, and this is especially true for participants who are difficult to recruit (Krueger, 1988).

Phase IV: Community Reporting. Upon completion of interviewing and narration of study results for community reporting, the research staff planned and co-hosted two community meetings with the HSAC relative to the transportation study; and likewise, co-hosted a community meeting with the HSAC and the Foster Grandparent Program of P.E.A.C.E., Inc. relative to the retirement study. Overhead media presentations were used to report study findings during all of the community meetings. Failure by researchers to report their findings in the community under study is a potential barrier to black research participation (Burton & Bengtson, 1982).

In addition, a variety of activities and presentations were planned as a part of selected community meetings, including: refreshments, a video tape of seniors performing physical exercises to gospel music (and moderated by a locally retired community activist), background music and gospel singing groups, and a luncheon honoring retirement study respondents. Other presentations featured during the community meetings include reports from seniors of community activities available for older persons, and social agency reporting of community information or topics of interest. Communal activities and relationships have been shown to have a positive influence on ethnic group bonding and individual well-being (Coke, 1991; Coke & Twaite, 1995; Taylor & Chatters, 1986a, 1986b; Walls & Zarit, 1991). Thus, the community meetings in this study were designed to present research results to the community, and to provide public opportunities for addressing community-defined needs.

Discussion

The research activity described in this project provided a positive experience for both the participants and the communities under study. Most notably in terms of the project's measurable success is the fact that all of the participants recruited in this research were retained until project completion. Previous investigators have mentioned a concern with low or poor retention rates among eligible respondents (Ballard, Nash, Raiford & Harrell, 1993; Dodge, Clark, Janz, Liang & Schork, 1993; Potashnik, Myers & Pruchno, 1990; Stoy, 1994). This concern is particularly apparent with respect to black research participants (Brown, 1997; Jackson, 1997; Patrick, Pruchno & Rose, 1998; Pinn, 2000).

How did this investigation succeed in recruiting and retaining black research participants? First, responsible social research should reflect attention to its social implications rather than merely serve as a question and answer session that is void of community involvement (Burton & Bengtson, 1982; Downing & Copeland, 1980; Jarrett, 1993; Levkoff, Levy & Weitzman, 2000; Patrick, Pruchno & Rose, 1998; Sinclair et al., 2000). An underlying philosophy of this study, therefore, is that the project was based on a sense of shared responsibility between the research staff and community constituents.

A systematic effort was made to encourage community volunteers to act as stakeholders (Cousins & Earl, 1995) in this research. This means that the researchers generated opportunities for community volunteers to assume active rather than passive roles in the overall project (Burton & Bengtson, 1982; Butler, Harbert & Anderson, 1981; Levkoff, Levy & Weitzman, 2000; Patrick, Pruchno & Rose, 1998; Sinclair et al., 2000). Also, as a result of aggressive community-outreach, the research staff was able to create a pro-research environment sufficient to establish mutual trust between the research institution and the black community; and hence, community sanction and support of research activities (Burton & Bengtson, 1982; Butler, Harbert & Anderson, 1981; Patrick, Pruchno & Rose, 1998).

Second, the application of a personalized study approach proved to be an effective recruitment strategy, given the positive community support demonstrated for this project. Research has shown that blacks are more receptive to personalized or direct person-to-person recruitment strategies (Downing & Copeland, 1980; Jarrett, 1993; Levkoff, Levy & Weitzman, 2000; Sinclair et al., 2000; Vesey, 1995, 1998). Participants in this study were referred to the research staff primarily by community volunteers or key informants such as members of the HSAC.

Receptivity to the personalized recruitment strategy could mean that participants felt that it was safe as well as beneficial (Sinclair et al., 2000) for them to participate in this research. Once they had consented to participate in this project, they made a conscious effort to remain in the project until it was completed. Borrowing an analogy from the matching model of recruitment (Levkoff, Levy & Weitzman, 2000), the fundamental tenet of the personalized recruitment strategy is that – a match between the perspectives of community volunteers and research participants on one hand, and the research community on the other hand – can lead to success in recruitment and retention of blacks in aging research.

Race matching may have also had a positive influence on recruitment and retention in this project, inasmuch as the research interviewer (and the focus group moderator), most of the participant referral sources, and all of the participants were black (Anderson, Silver & Abramson, 1988; Becton & Brown-Glaude, 1997; Bradburn, 1983;

Markides, Liang & Jackson, 1990; Sinclair et al., 2000). Not all researchers concur with the notion that race matching may be beneficial in conducting research with black respondents (Anderson, Silver & Abramson, 1988; Maykovich, 1977; Weiss, 1977). This revelation seems somewhat ironic in light of the fact that formal research practice has consisted, predominately, of white investigators and white participants (Downing & Copeland, 1980; Jackson, 1980; Levkoff, Prohaska, Weitzman & Ory, 2000; Manuel, 1982; Smith, 1987).

However, there may be another explanation for this project's success in recruiting and retaining black participants. This investigator was a known entity in both of the studied communities, which facilitated access to referral sources such as the HSAC and other community support systems and networks. This permitted the investigator to "hit the ground running" and, in essence, eliminate potential barriers to planning, designing and implementing project activities. For instance, given this researcher's recognition in the project communities, he was able to conserve start-up time that might have been necessary as an "outsider" in conducting ethnically-sensitive and competent research with black participants (Burton & Bengtson, 1982; Jarrett, 1993; Levkoff, Prohaska, Weitzman & Ory, 2000; Patrick, Pruchno & Rose, 1998; Sinclair et al., 2000; Vesey & Pillemer, 1998).

Weiss (1977) and other investigators (Anderson, Silver & Abramson, 1988) argue that use of indigenous researchers could be problematic in conducting black research. While this statement may have some validity, Jackson (1985) has long advocated the need for trained, competent and indigenous black investigators who are interested in research on black aged as well as issues related to black aging (Downing & Copeland, 1980; Jackson & Gibson, 1985; Levkoff, Prohaska, Weitzman & Ory, 2000; Markides, Liang & Jackson, 1990; Sinclair et al., 2000; Vesey, 1994).

Third, the use of community meetings to bring closure to this research process seems appropriate in light of Burton and Bengtson's (1982) cautionary suggestion that community involvement should be evident in the entire research scenario. In a real sense, the community meetings served as crowning points of the two studies over a two-year period, and involved diverse cultural populations, community groups and social institutions engaged in participatory action.

The primary purposes (or planned outcomes) of the community meetings are stated here. First, the research staff reported on the findings of the research and explained how the information could be used, such as remitting the final report to community policymaking bodies, aged planning authorities, and health and social services agencies. The data could also be used in submitting formal papers on the research project to professional and educational review journals and national gerontological societies.

Second, the research staff aimed to meet community-defined needs by providing a forum for community and social agency discussion of aged problems and issues, and for presentation of information on community services available for elderly individuals.

Third, the research staff expected to maximize the positive atmosphere and mutual respect that was demonstrated throughout this project by leaving community volunteers and research participants with a wholesome and rewarding experience.

Conclusions and Future Directions

What direction should studies on black aged pursue in the future? And at what cost? This paper has presented a working template for recruiting and retaining older blacks and their communities in formal research. To summarize, researchers should: (1) apply a soundly planned research design that maximizes black community participation in the overall conceptualization of the research; (2) contact key informants and community volunteers during the initial stages of the research; (3) draw and contact the study sample in a manner that is ethnically-sensitive to black community perceptions, needs and cultural preferences; and (4) use a community planning strategy to report on research findings, especially in the context of black community predilections, strengths and needs.

It is essential for the researcher to have a clear conceptual framework for involving the black community in the research activities. This includes familiarization with other successful models on black recruitment and retention for research participation.

Finally, cost-time factors associated with different recruitment strategies were outside of the focus of this research. Future researchers should consider application of some type of cost-time measurement of different recruitment strategies versus retention rates. For instance, a recent study found that social agencies, support groups and snowball recruitment were low-to-moderate cost strategies but less effective in recruiting older black caregivers. Media and demographic sampling unit strategies were more effective in recruiting older black respondents (Patrick, Pruchno & Rose, 1998).

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