PROCESS OF SEARCHING FAMILIES FOR DATA COLLECTION IN QUALITATIVE RESEARCH

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ABSTRACT

Objective: to reflect on the process of searching families in the rural area to participate in research.

Method: reflection on the search process undertaken in two studies (A and B) based on four factors: theme, selection criteria, role of the mediator and researcher's position concerning gender, age, profession and affiliation.

Results: the analysis of these four factors in the search process for the participants shows that the mediators' help was fundamental to select and get access to the families at their homes. Difficulty was observed to hear different family members. In study A, adult men were the main participants and, in study B, adult women, in accordance with the interviewers and mediators' gender in each research. The researchers need to reflect on their positions, choice of the theme, participant selection criteria, role of the mediator to assess the difficulties in recruiting the participants and impacts in the results of research in the rural area. **Conclusion**: the researchers should better consider the recruitment process of the participants in order to enhance the quality of qualitative research.

DESCRIPTORS: Qualitative research. Rural population. Family. Research subjects. Nursing.

PROCESSO DE BUSCA DE FAMÍLIAS PARA A COLETA DE DADOS EM PESQUISA QUALITATIVA

RESUMO

Objetivo: refletir o processo de busca de famílias para pesquisa na área rural.

Método: reflexão sobre o processo de busca realizado em duas pesquisas (A e B) a partir de quatro fatores: o tema, os critérios de seleção, o papel do mediador e a posição do pesquisador em relação ao gênero, idade, profissão e filiação.

Resultados: a análise destes quatro fatores no processo de busca dos participantes mostra que o auxilio dos mediadores foi fundamental para selecionar e acessar as famílias em seus domicílios. Houve dificuldade em ouvir diferentes membros das famílias. Na pesquisa A, houve maior participação dos homens adultos, e na pesquisa B, das mulheres adultas, o que coincidiu com o gênero dos entrevistadores e mediadores de cada pesquisa. Reflete-se que há necessidade da reflexividade dos pesquisadores sobre suas posições, escolha do tema, critérios de seleção dos participantes, papel do mediador para avaliar as razões das dificuldades no recrutamento dos participantes e impactos nos resultados das pesquisas em área rural. Conclusão: o processo de recrutamento dos participantes deve ser melhor considerado pelos pesquisadores para a maior qualidade das pesquisas qualitativas.

DESCRITORES: Pesquisa qualitativa. População rural. Família. Sujeitos da pesquisa. Enfermagem.

PROCESO DE BÚSQUEDA DE FAMILIAS PARA LA RECOLECCIÓN DE DATOS EN LA INVESTIGACIÓN CUALITATIVA

RESUMEN

Objetivo: reflexionar sobre el proceso de búsqueda de familias para la investigación en el área rural.

Método: reflexión sobre el proceso de búsqueda realizado en dos investigaciones (A y B) a partir de cuatro factores: el tema, los criterios de selección, el papel del mediador y la posición del investigador en relación al género, edad, profesión y filiación.

Resultados: el análisis de estos cuatro factores en el proceso de búsqueda de los participantes muestra que el auxilio de los mediadores fue fundamental para seleccionar y tener acceso a las familias en sus domicilios. Hubo dificultad para oír a los diferentes miembros de las mismas. En la investigación A hubo una mayor participación de los hombres adultos, y en la investigación B de las mujeres adultas, lo que coincidió con el género de los entrevistadores y mediadores de cada investigación. Existe la necesidad de reflexivilidad de los investigadores sobre sus posiciones, la elección del tema, los criterios de selección de los participantes, la función del mediador para evaluar las razones de las dificultades en el reclutamiento de los participantes y los impactos en los resultados de las investigaciones en el área rural.

Conclusión: el proceso de reclutamiento de los participantes debe ser mejor considerado por los investigadores para una mejor cualidad de las investigaciones cualitativas.

DESCRIPTORES: Investigación cualitativa. Población rural. Familia. Sujetos de la investigación. Enfermería.

INTRODUCTION

Despite recent advances, qualitative research is still being improved and researchers in this modality struggle to gain increasing credibility in the scientific world. The literature¹ alerts that the planning and execution of qualitative research, especially the selection and the search for the participants, translate into a certain emotional involvement, require the planning of time and the ability to establish relationships that are fruitful to achieve significant results from the perspective of research projects. In qualitative research in which the participants are family groups, these aspects gain fundamental importance, especially in their households, for enabling, in addition to interviews, other techniques such as observation. This becomes particularly more difficult when families are sought in remote rural areas or even in hardto-reach urban areas.

With regard to the participant selection and search process in qualitative studies, the criteria for selecting the participants and strategies for data collection are emphasized. The search process (recruitment) of the participants surveyed is usually underestimated though. The lack of focus on this stage hides an important part of the data collection strategy in qualitative research, particularly in interviews.²

The recruitment process directly contributes to the quality of the research, given that the researchers seek the opportunities offered in the study context for its development and structure the final material in an interaction with the pre-defined criteria to elect the participants and the mediators.² Mediator is a person who, due to his/her formal or informal position and social relations, can facilitate the contact between researcher and potential informants.³

It is also emphasized that the lack of focus on recruitment compromises the reflexivity that has become important in qualitative research in recent decades.² Reflexivity is seen as a continuous process of internal dialogue and critical self-assessment of the researcher's position, as well as active and explicit recognition of his/her position, which may affect the process and the results of the research.⁴⁻⁵

There are four factors to consider to find participants:² 1) meanings and effects of the topic to be researched; 2) meanings and effects of the sample, the inclusion and exclusion criteria; 3) meanings and effects of the mediator (gatekeeper)³; and 4) meanings and effects of the researcher's position and situation (ability to reflect on position in terms of gender, age, origin, ethnicity).⁴

Regarding qualitative research involving families, it should be mentioned that there is controversy about what research is actually done with families or research related to families. The four focus of interest in this type of research are: a) the individual, as a member of the family, where the family serves as context and the emphasis is on the individual (subject) phenomenon; b) the individual as part of a family subgroup, in which both individuals and relationships are studied in the context of the family; c) families as a group, which has the family as focus; and d) individuals and families, where the focus may be two or more levels of the subsystem, which includes individuals, relationships and families.6 Research using the individual responses of family members is called family research. Thus, the issue of access to families entails a direct implication for the research focus and the ways of approaching the phenomenon.6

Searching for families in the Brazilian countryside is also an important challenge for researchers, given the reality found in different regions. Even in the South of Brazil, there are still cities that are difficult to reach by road and the media in general. This makes it difficult to use current strategies in the search for data, such as the internet, or even makes it difficult to have simple telephone contact to make an appointment. The difficulty of access and the contact with rural areas often represent an important restriction to know this reality better, privileging research in urban centers.

Based on the process of searching families for research in the rural area, in two studies carried out with families, in health sciences and social sciences applied in the field of nursing and administration, respectively, the aim in this research was to reflect on the search process of families for research in rural areas in two cities of Santa Catarina.

In addition to increasing the production of knowledge about qualitative research, we believe that this reflection can contribute to the researchers who use this research modality, especially regarding the recruitment process of the study participants.

Identification and the theme of the two studies

The subject of a research has a significant impact in the selection of the participants studied and, thus, in the delimitation of the experiences and signification processes, which are more likely to be included or not in the object of the researcher's analysis. The research theme can therefore delimit facilities as well as difficulties in obtaining the data of a research.²

Research A

It consisted in a doctoral dissertation of a Postgraduate Program in Administration, whose objective was to understand the orientation of the action in the production modes among families linked to the agricultural activity in small rural properties. The main theoretical reference was the interpretative epistemological dimension, based on the analysis dimensions of Weber's social action theory. The research site was located between two locations with a predominance of farmers of German descent in the rural area, in the interior of the city of São Bonifácio, Santa Catarina, Brazil. The design adopted was qualitative research, a multiple case study, comprising 13 families, with a total participation of 27 individuals in the interviews. The first families were indicated by a mediator, and later by indication of the families interviewed. Interviews and non-participant observation were conducted.8

Research B

Thesis undertaken in a Postgraduate Program in Nursing. The objective was to understand how care routines and rituals for health promotion are interpreted in rural families in an unexpected transition from post-disaster situations. The analytical theoretical framework was interpretative,9 also based on the theoretical framework of routines and care rituals 10-11 and on the theory of the family life cycle. The research was carried out in a rural location of a city in Vale do Itajaí / SC, affected by a major climatic environmental disaster that occurred in 2008. The study approach was a qualitative, multiple case study, composed of six families, totaling twelve adult subjects interviewed, ten children between 0 and 12 years old and three adolescents. The families were initially indicated by the mediators and later by other families. The participant observation was gradual and concomitant to the accomplishment of narrative interviews at the home of each family, one year after the disaster. 10-11

Meanings of selection criteria in the search for families

For the participant selection criterion in a qualitative research, "a qualitative sample, better known as case selection, the researcher's gaze is less fixed beforehand and moves incessantly from one point to the other." This means that the process of searching the research participants is guided towards the achievement of the objectives and simultaneously is an exploratory work. The selection process is not a scientifically neutral process, but imbued with subjective decisions. The search for the participants is a process in which it is possible to grant more voice to some interviewees and to silence others.²

In research A, the inclusion criteria proposed were: families of farmers holding small rural properties who had some agricultural production activity in which the work performed was shared among the members of this family group. The different types of nuclear and extended families were considered, whether or not they lived in the same home or property, provided that they attended to the criterion of shared agricultural work. The analysis of the data concomitant to the data collection showed different modes of agricultural production, which led to the search for more families to cover similar and differentiated production modes.

In research B, the nuclear family consisted of parents or one of the parents and children. Regard-

ing the inclusion criteria, the researcher initially sought families with at least one child aged 0 to 12 years old, which would characterize families in the acquisition life cycle phase. When the local health team members were asked for help to select families that might qualify to participate in the survey, the presence of children was emphasized further. After getting into the field, however, the difficulty to seek nuclear families with children only was found, as the indicated families included not only children, but also adolescents, characterizing the families in the adolescent phase of the life cycle. Thus, the delimitation of cases based on a specific phase of the family life cycle was discarded, and the local reality and the condition to access the families were considered.

The gatekeepers' role in the search for the families

A search strategy for informants in qualitative research involves a mediator who is also called a gatekeeper of the research.³ The mediators directly influence the search for the informants and, consequently, the material produced for the research, given their familiarity with the context. Their influence can also limit the scope of the research, so the researcher needs to be aware of the possible direction the mediator may have.²⁻³ In addition, given the gatekeeper's familiarity with the research universe, his relevance enhances the selection process of cases. Thus, we report how the mediators were identified in the two studies, their activities and how they were oriented.

Research A: the entry into the field was gradual since the design phase of the project. Due to the distance from the researcher's home to the site, there was a need for lodging and stay in the field for a few days, including weekends in each stage of the research. The lodging was in the house of a relative of the researcher who lives in the central part of the location. This allowed the establishment of contacts with families from the two locations, observation, contacts and preliminary visits to potential target families of the research. In the data collection stage, the lack of telephones available between families in the two research locations and the distance between their respective properties made it difficult to make prior contacts. Thus, a visit was necessary before the interview to make an appointment, which was scheduled for the early afternoon of the same day or the following day. Due to the availability of the researcher and the families, several interviews were conducted during weekends.

This process was facilitated by a mediator, a member of the researcher's own family circle, born in the city, owner of a rural property in the location, and who maintains close relations with residents. The mediator was aware of the research focus, initially through informal conversations, and later received the project for reading. The role of the mediator who accompanied the visits was essential to establish a climate of trust between the researcher and the respondents. Mainly at the beginning of each interview, while the researcher adjusted the tape recorder and aimed to organize the interview script, the facilitator conducted an informal conversation with the interviewees, facilitating the researcher's work. In some cases, during the observations of the property and even in some interviews, the mediator helped to raise new questions about those aspects that needed more details. In other interviews, the facilitator would entertain himself with other family members while the questions were addressed to a specific member. After the visits, conversations with the mediator provided useful insights for the maturation of the data analysis.

Research B: given the professional trajectory of the researcher, the entry into the field occurred through the Primary Health Care Unit (UBS). The first contact and reception of the researcher at the service happened through a nurse the researcher already knew, who presented the UBS and the location the health team was responsible for. After presenting the research proposal to the health team and informing on the selection criteria, the researcher counted on the report, particularly of the nurse and the community health agents, regarding the health situations of the families they visited. They also provided a background on the history of each family in the disaster, which indicated the potential of each as an "interesting case" for participation in the survey. These community agents consequently became the mediators in the research. This way of informing on the families' "general state" expressed, on the one hand, what the collaborators understood as their criteria for choosing families, which were those considered to be the most problematic though. In another sense, this may also mean a kind of interest of the health team in the researcher's work, who is a health professional.

In the first contact with the families, the community health agents approached the researcher, presenting her as "a nurse interested in talking about a research". The first visits took place on weekdays and at weekends, which also made it possible to observe what happens in the commu-

nity at these different times. It also revealed that the families could only be contacted at weekends.

About the researcher's role in the search for the interviewees

Reflexivity is the main quality control strategy in qualitative research.⁴⁻⁵ Understanding how the experiences and characteristics of the researcher, such as gender, personal and professional experiences, affiliation, significantly affect research can impact and are therefore of paramount importance.

In survey A, on the gender position, most of the interviews took place with the men in the families, with some exceptions. Given the access situations, as access took place upon the first visit, there was a tendency for men to receive and show the property to the researcher and mediator, who were both males. In the interviews, the men were keen to answer the questions about the property and, even in those questions when the women participated (mostly wives), men exercised some leadership.

As for personal and professional experiences, the researcher was already somewhat involved with both locations since childhood. Thus, although coming from the urban area, the researcher had local identification and rural experience, besides the same ethnic origin as the families. The researcher's professional position was not relevant in the search for the families, contrary to what happened in research B.

In research B, in relation to gender, the researcher and the mediators were female, thus, the women performed all preliminary activities and the reception at home. Regarding the professional position, the role of the nurse was initially predominant, and the participating families felt entitled to ask for opinions about health issues in the family. It is believed that this contributed greatly to the relationship of trust, so that the role of researchers gradually stood out, although without freeing herself of the role of the nurse. The affiliation of the researcher, granddaughter of families of farmers living in the region, had to be rescued at times when, aware of her urban condition, she sought empathy concerning themes specific to rural life.

Reflecting on the search process for the participants

As previously mentioned, qualitative researchers still need to fight to ensure their legitimacy, so the researchers' efforts need to focus on ensuring its quality. Traditionally, in the researcher's educa-

tion, we discuss the differences between qualitative research and quantitative research, and one of the first lessons learned and reiterated in the classical bibliography of this area is that the researcher is the main instrument of qualitative research. Thus, the search for quality is linked to the acts of reflecting on the research process.⁵

Qualitative studies deal with the phenomena of human experiences and not of populations, whose sample is chosen at random. Thus, to select the participants, the interest is in their subjectivity and, mainly, in their experience with the subject.⁵ Thus, in the recruitment process, the main problem is not simply to find the participants for a research. The challenge is to find the right participant.¹

In the question on family research,⁶ especially when families are sought as a group, this challenge becomes even greater. Besides finding the families in which different members can and want to share their experiences, the researcher also needs to gain access to and establish interactions that result in fruitful data for the study objectives.⁵

In the presentation made with examples of the two studies with families in the rural area, the meanings and effects of the theme, the inclusion and exclusion criteria; the mediator; the reflexivity about the position and situation of the researcher (capacity to reflect on the position in terms of gender, age, origin, ethnicity)⁴ permitted some reflections on the search for participation in research.

The interviews with the different family members, as well as the observation of the properties, were of fundamental importance to obtain the data in the two studies, aiming to reach the objectives of the studies and to establish a certain bond of interaction, respect and confidence with the proposal of the research "which facilitated the comings and goings of the researcher's fieldwork throughout the immersion period in the data collection. In this sense, gaining access to such families in the rural area in the search process entailed countless challenges.

Regarding the research topic, seeking families to talk about the production modes of agricultural activity in research A, and talking about care routines in health promotion one year post-disaster in survey B, the challenge was smaller. Depending on the topic, the interview is a positive opportunity for the interviewees to present their experiences.² In the case of family research however, the greatest difficulty was to listen to different members of the families. Young people and adolescents presented greater restrictions to talk to the researchers or, when they did, they demonstrated less interest.

Thus, certain themes can be difficult to address, for the interviewees and for the interviewers.² Or, in addition, subjects the interviewees are not interested in. Therefore, some are discussed more frequently in the surveys, resulting in greater knowledge produced in relation to these to the detriment of others. In family surveys, certain topics lead to the participation of a family spokesperson, and only partial data on the subject can be obtained. The subjectivity of the interviewees in the families surveyed ensures that the same theme is perceived, interpreted and discussed under different viewpoints in the interviews, which, qualitatively, becomes interesting for the analysis of the investigated themes.

Describing the difficulty of different family members or other participants to talk about certain research topics may help other researchers to refine their search strategies and develop interaction strategies capable of obtaining data.

Regarding the meanings and effects of the inclusion and exclusion criteria, in the search for the families, in both studies, for recruitment purposes, the participants changed in the course of the study. In the example of research B, the researcher, getting accustomed to the field, found that she could not limit herself to families with only children, advancing to include also families with adolescent children. This corroborates the literature,² in that the participant selection criteria constitute exploratory work to reach the research objectives. When the criteria are overly closed, they reproduce cultural ideas about who can respond to certain themes, without actually exploring the subject with different people, even the most difficult ones to get access to. This again leads to the argument that certain groups are more studied than others. And in family research, some household members are more easily accessed than others, directly affecting the knowledge produced.

Therefore, in their reports, in addition to the reasons for inclusion and exclusion criteria, researchers should describe the choices regarding space, time and recruitment strategies. They should openly discuss the difficulties encountered in selecting certain groups of people, families, family members, using reflexivity, thus discovering taboos and prejudices related to both the researcher and the research participant.²

Many challenges were overcome in the search for families in the rural area, in the example of the two surveys, largely through the way in which the entrance in the field took place with the help of the mediators. The research data show that, in research A, the entry was through a mediator from the researcher's own family. In research B, the access was through the professional link with health agents, which determined the choice of the mediators and the experiences that followed, influencing both the selection and access of the families, as well as the production of the data. The influence of the mediators in the search for families was especially prominent in research B, indicating the need for the researcher to make sure that the gatekeepers truly understood the research objectives, as the families indicated were only those that needed assistance, according to the health agents, rather than families in general who underwent the transition after a disaster. This is in keeping with the literature,² in the sense of focusing on the choice of the gatekeeper, who can be a facilitator, but may also silence important voices in the production of the data and the final research result. Also, during the research, the power of the researcher and the mediator during the recruitment process needs to be taken into account.³

Thus, given the importance of the mediator throughout the research process for both success and failure, the researchers should establish relationships of trust and clarify the research objectives and selection criteria to the mediator. The researcher should request the mediator's subjective description of the reasons for indicating the participants for the research. In the research reports, the reason for choosing the mediators, the relation with the researcher, the orientation received prior to the research and the role of the mediator in the entire research process should be described.

Regarding the researcher's position in the search and the motivation to recruit the families and their members, the example of the two surveys shows the impact of the gender and the background experiences of the researchers and also of the mediators.

Concerning the search for the interviewees within the family, in research A, in order to understand the family's agricultural production methods, as in research B, to understand family care routines in the post-disaster period, the challenge was to obtain data from different family members. In the reflection about the position of the researchers and mediators in this search, the gender aspect, allied to the research theme and the family trajectory, provided different experiences in the two surveys. In research A, the researcher and the mediator were male, with greater participation of adult males, while women participated less and younger subjects participated with greater difficulty. In research B,

the researcher and the mediators were female, the predominant participation was female and young people also participated less.

It can be inferred here that the values related to the roles each member assumed in the family were of great relevance: agricultural activities are the man's subject, care routines are more closely related to women. Young singles or adolescents demonstrated to be less interested in the two themes, perhaps influenced by the gender and age of the researchers. In this regard, there is the example of a research² aimed at discovering about the social role of children, in which the researcher was a woman and a middle-class mother, the inclusion criteria being men and women of all classes. Middle-class women were very easily recruited, while workingclass men could not be recruited. The authors mentioned that the class, the gender of the researcher and the preconceived ideas of gender equality on the topic influenced the recruitment.

The researcher's professional position was more relevant in research B, and entailed implications in the search for the families, as already highlighted, related to the mediators' understanding of the research objectives and of the researcher's role. As for the position of the researchers in the approach to the rural area, the researcher's affiliation was relevant in research A. In research B, it also helped in the approach with the families in some situations.

Finally, these data refer us back to the practice of reflexivity as a quality control strategy throughout the research process.⁴⁻⁵ And the importance of exercising constant control to understand the factors that motivate people or families, groups to participate in research.

Research groups should bring to light and further discuss the reasons why some topics are more investigated in certain groups of people. The researchers can seek the answers to such questions in the more detailed analysis of the search process for the participants.² Why are there resistances? This search/recruitment phase has many challenges to face and is often difficult to anticipate, with consequences for the research results.

CONCLUSION

The search for the quality of the research, especially in the qualitative modality here, requires that the researchers pay attention throughout the process, from the design to the conclusion. The method, considered as the brain of the research, needs to be well delineated so as not to compromise

the quality of the study. Therefore, the importance of the participants' recruitment process should not be underestimated.

In this reflection, the extent to which the research topic, the selection criteria, the role of the mediator and the researcher's position in the recruitment of the participants can serve as facilitator in the research were highlighted, depending on how they were thought and executed.

Therefore, the researchers need to better consider the description of the search process for the participants for the sake of a greater credibility and quality of qualitative research. That explains the importance of this study, in addition to its originality in this area of knowledge.

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