

***Moving Stories Guide:  
Conducting Culturally Competent  
Oral History Interviews with Older Adults***



Ana Jardim Messenger, BA  
Tina Maschi, PhD, LCSW, ACSW  
Marina Coleman, BA

**Fordham University  
Graduate School of Social Service**

Moving Stories Project c/o  
Fordham University Graduate School of Social Service  
113 West 60th Street  
New York, NY 10023  
Email: [collab@fordham.edu](mailto:collab@fordham.edu)  
Phone: (212) 636-6633  
Fax: (212) 636-7876  
Web site: <http://www.fordham.edu/movingstories>

**Baccalaureate Experiential Learning (BEL) Project-Moving Stories: Older Adults Talk about their  
Experiences Before, During, and After Immigration (2008)**



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**Baccalaureate Experiential Learning (BEL) Project****Moving Stories: Older Adults Talk about their Experiences Before, During, and After Immigration****Project Description**

Fordham University's Graduate School of Social Service (New York) has launched an innovative initiative, *Moving Stories Project: Older Adults Talk About Their Experiences Before, During, and After Immigration*. The project enables BSW students to partner with older adults, who volunteer to share their personal or family immigration experiences. Fordham students enrolled in the senior year integrative seminar can access all references and readings through Blackboard under the Project Resources link. This intergenerational relationship enables students to:

- learn and conduct culturally competent oral history interviews;
- work collaboratively with their older adult partners to create poster-size visual accounts of their lives and/or cultures; and
- present their collaborative work experience during a spring semester group forum.

This guide provides students, instructors, and other individuals with the basic knowledge, values, and skills for documenting the lives of older adults. The guide is also available at the *Moving Stories* Web site ([www.fordham.edu/moving\\_stories](http://www.fordham.edu/moving_stories)). This project is funded by the John A. Hartford Foundation through the Council on Social Work Education's Gero-Ed Center.

*Suggested reference for this guide:*

Messenger, A., Maschi, T., & Coleman, M. (2008). *Moving stories: Conducting culturally competent oral history interviews with older adults*. Retrieved [Month, Day, Year], from <http://www.fordham.edu/belproject>



**FORDHAM UNIVERSITY**  
THE JESUIT UNIVERSITY OF NEW YORK

Graduate School of Social Service

## Moving Stories

### Conducting Culturally Competent Oral History Interviews with Older Adults



#### Introduction

Immigrants from all over the world form the backbone of the United States. In fact, from its inception, people came from different continents, including Africa, Asia, Europe, and South America, to build this nation. In honor of the contributions of first-generation immigrants and their descendants, we have created the oral history project, *Moving Stories: Older Adults Talk about their Experiences Before, During, and After Immigration*. This project enables social work students to partner with older adults with personal or family histories of immigration to relive and learn from that experience.

This guide helps students prepare for their “oral history” journey by providing the knowledge and skills needed to conduct culturally competent oral history interviews. It begins with an overview of the culturally competent oral history interview process using the six major steps: *plan, prepare, exchange, preserve, present, and evaluate*. These steps are reviewed in that order.

#### The Oral History Interview

Oral history is a process in which students encourage older adults to talk about periods of their lives, eliciting stories that recount historical periods through the lens of their emotional and personal perspectives. This type of intergenerational project has many benefits, but, in particular, oral history projects create opportunities for students to develop a personal connection to the past and the life of their community. It enables students to learn how people’s experiences were shaped during historical periods in a way that cannot be captured in books or through secondary research. It also increases students’ positive attitudes towards aging and older adults through their contact with and understanding of older adults’ life stories. This is achieved, according to Carol Poll (2002), through the “face-to-faceness” of the interview, which provides the student with an opportunity to enter the life, mind, and definitions of the other. This process facilitates sharing, empathy, and the realization that the interviewer and the respondent share essential similarities; the process has been identified as a mechanism that debunks stereotypes and bias (Allport, 1958; Sonnenschein, 1988).

# **The Six-Step Process for Conducting Culturally Competent Oral History Interviews with Older Adults**

## **Overview of the Six Step Process**

Conducting an oral history interview is a six-step process:

- 1. Plan**
- 2. Prepare**
- 3. Exchange**
- 4. Preserve**
- 5. Present**
- 6. Evaluate**

These six steps are a modified version of the Utah Statehood Centennial Commission's (2007) recommendations for conducting oral history interviews. A detailed description of these six steps follows.

### **Step 1: PLAN**

The planning stage involves gathering information about oral history projects, establishing project goals, choosing the interviewee, contacting the interviewee, and deciding on materials/equipment for the interview.

#### **A. Gather information about oral history**

Besides reading this guide and the references listed in it, we recommend the video "Capturing the Past: How to Prepare and Conduct Oral History Interviews," produced by the Utah Statehood Centennial Commission 2007 and available from Direct Cinema (<http://www.directcinema.com/>). This video is also available on Blackboard under Project Resources.

#### **B. Establish Project Goal**

Once you have done some reading on oral history projects and watched the video "Capturing the Past," think about the project goals and your personal goals. This will help you make clear choices for your project.

The overall goal of the project is to increase students' positive attitudes towards and cultural competence with older adults by having students relate to older adults with an immigrant

background through the oral history process. To fulfill this overall goal, you may wish to establish personal goals you would like to achieve with this project. This process will help you decide who you would like to interview. Suppose your goal is to learn more about a culture that you have contact with at your work, but know little about and, therefore, occasionally feel unprepared to assist people from this culture in an effective way. Or you might wish to learn more about a culture that you intend to work with more in the future and you see this project as a training opportunity. You might also want to interview someone with an immigrant background who has made a significant contribution to her or his community. Or you might even want to learn more about your own immigrant culture, from which you feel disconnected. Whichever path you choose, it should offer you a genuine opportunity to practice your skills in relating to an older adult and to explore unfamiliar aspects of a culture.

### C. Choose the Interviewee

Once you decide on your goals, you can begin determining who will be your interviewee. He or she should be 55 years old or older, and should be a first, second, or later generation immigrant to the United States.

He or she might be someone you know directly or through other people, or you might want to get in touch with service organizations that can refer you to potential interviewee candidates. A number of these organizations have already been contacted by Fordham and are willing to work with the students on this project. A list of these service organizations is available at [www.fordham.edu/moving\\_stories](http://www.fordham.edu/moving_stories).

### D. Contact the Interviewee

Whomever you decide to interview, initiate the contact early, either directly or through intermediate sources. For various reasons, it might not be possible to interview that person, and you do not want to wait too long to learn that.

#### *Write a letter or e-mail*

If your interviewee is somebody with whom you have not had previous contact, we suggest you send her or him a letter or e-mail, explaining the nature of the project, who you are, why you would like to interview her or him, how long the interview will take, and what you will do with the information. You should also attach a copy of the permission form for the interview. If you would like to record the interview, i.e., audiotape, video tape, and/or take photographs, you will need to request permission to do so. Samples of a contact letter and permission forms are available in Appendix B.

#### *Make a phone call*

A few days after you have sent the letter or e-mail, make the first phone contact with your potential interviewee. Go over the information you gave on the letter, and give more details

about the interview logistics, such as permission to audio and/or video record the interview, answer any questions, and set up a day, time, and location for the interview.

### *Follow-up call*

One or two days before the interview, call the interviewee to remind her or him of your previous arrangements and answer any questions she or he might have.

## **E. Decide on equipment**

Once you know more about your interviewee, and you have determined a location for the interview, you can decide on what equipment, if any, you would like to take with you. Provided that you have permission from your interviewee, we recommend that you have a video camera or, at least, a tape recorder with you. This will allow you to focus on the most important aspect of the process: actively listening and encouraging your interviewee in her or his storytelling process. Video cameras and tape recorders are available for students at the Lincoln Center Campus through the Faculty Support Staff Supervisor (Joe Caputo; [caputo@fordham.edu](mailto:caputo@fordham.edu)) or, at the Westchester Campus, through the Academic Administrator (Aida Lau; [alau@fordham.edu](mailto:alau@fordham.edu)). For complete contact information, please see Appendix A.

If you decide to buy your own tape recorder, we recommend the Sony Digital Voice Recorder ICDP620 for its affordability (\$60) and ease of use. It has an internal microphone, but can also use an external mike. It can also upload digital files to a computer, which will enable you to burn the interview onto a CD-ROM.

## **Step 2: PREPARE**

This stage involves learning the questions for the interviewee, doing background research, evaluating your own preconceptions about the interviewee, getting the permission forms signed, and getting equipment (such as an audio or video recorder) ready.

### **A. Learn the Interview Questions**

For the purpose of this project, the Fordham project staff has formulated a list of open-ended questions (in other words, an interview schedule), to help you establish a rapport with your interviewee. This Interview Schedule is available for download at the *Moving Stories* Web site at <http://www.fordham.edu/movingstories> and in Appendix B of this guide.

As Poll (2002) suggests, “unlike conducting structured interviews . . . , the questions serve as thematic guides and not as a mandatory blueprint. This structure enables the respondent to shape his/her history, which . . . is a major strength of the oral history” (p. 118).

### **B. Do Background Research**

Besides learning the suggested questions of the interview schedule in Appendix B, we suggest that you do some background research on your interviewee's culture. This will not only improve your efficiency and self-confidence as an interviewer, but it will also enhance the openness and appreciation of your interviewee towards you. Cultural research can help improve the bonding process between you and the interviewee, as well as the overall quality of your project. Below is a list of questions you might want to research prior to your interview. As James Hoopes (1979) suggests, think about how this information may relate to the interviewee's experience:

1. What language is spoken in that country?
2. What are the traditional holidays?
3. What are the traditional religions?
4. What major artistic contributions have been produced in her or his country of origin?
5. What was the historical context in the interviewee's country of origin when she or he was born? Consider the political regime(s), socioeconomic context, and religious and cultural norms.
6. What were the international repercussions of those historical events?
7. Was there a large immigration from that country? During what times?
8. What is the political, economic, and social context of that country nowadays?

### C. Evaluate Your Cultural Competence

Besides the research on the interviewee's cultural background, it is important for you to evaluate your own preconceptions about the interviewee and her or his culture. Increasing your understanding on how your own experience and worldview may affect your interactions with others from different backgrounds will enhance your cultural competence. Cultural competence is the *ability to work and respond* in a manner that acknowledges and respects individuals' culturally based beliefs, attitudes, behaviors, and customs (Rothman, 2008). For more information on Ethnicity and Diversity, please see Appendix C.

### D. Get Release Forms

In any oral history project, it is necessary to have a written consent from the interviewee, which confirms that she or he understands the purpose of the project and how the information will be used. You will also need written permission from the interviewee to take photographs, or audio or video record the interview. If your University Internal Review Board (IRB) requires informed consent, please have that completed as well. Please see Appendix B for samples of Fordham University IRB approved informed consent forms.

If you have sent your initial letter to the interviewee with the attached permission form, it is important that you get her or his signature on the form before or on the day of your interview. In addition, if an informed consent form is required, that also must be signed by the interviewee before you begin the interview.

## E. Prepare the Equipment

Practice using your equipment before the interview. Practice changing the tape before it is ended so that the process happens smoothly rather than having to change the tape abruptly in the middle of a sensitive part of the interview. Prepare all material you will need the day before the interview. Use the checklist (below) to help remind you what you will need:

- Note pads
- Pencils/Pens
- Photo Camera (if you intend to take photos)
- Tape Recorder
- Video Camera (optional)
- Extra tapes
- Extra batteries
- Extension cord

James Hoopes (1979) suggests using a bag to carry your pencils, note pads, recorder, batteries, and release forms, rather than arriving with your hands full.

## Step 3: EXCHANGE

Arrive on time for the interview. Try to create a calm atmosphere by being cordial and making the interviewee comfortable. Conducting the interview involves setting up materials and equipment, interviewing, taking pictures, and closing the interview.

### A. Set Up

*If you plan to use audio and/or video recording equipment, set up your equipment while you talk casually with the interviewee.* Once you are ready to start your interview, ask your interviewee if she or he is comfortable, and begin by restating your purpose and how appreciative you are of the interviewee making this time available to you. Here is an example of how you can do that:

“I’m very happy you were able to meet with me. As I said, this interview will help me with my studies as well as help me to better understand the needs of older adults.”

*If you are recording your interview:* At this point, start the audio and/or video recorder, and begin by recording your name, the interviewee’s name, the date, and the purpose of the interview. For example: “Today is October 29, 2008. My name is Amy Garten, and I am going to interview Mr. Carlo Fontina, at his home in Morristown, New Jersey, regarding his life experiences as a first-generation immigrant in this country.”

Now you are ready to formally begin the interview.

## B. Interview

During the interview, the interviewee should do most of the talking, with the interviewer listening and encouraging (Brown, 1988).

*Do's and Don'ts during the Interview\*:*

1. Be a good listener and show with your body language that you are genuinely interested in the interviewee's life experiences
2. To encourage the interviewee to talk in greater depth, use follow-up questions, such as "Tell me more about this." "Can you describe that in more detail?" "Can you give me an example of that?"
3. Use what you have learned from the interviewee (or from your previous background research) to frame your questions.
4. Take notes, even if you are recording the interview. You can write down some of the most meaningful words, and describe gestures, facial expressions, and other aspects that aren't captured by the recorder.
5. If you are enjoying the process, don't be afraid to show it to the interviewee.
6. Don't be judgmental. An empathetic approach will help to establish rapport.
7. Don't correct answers given by the interviewee.
8. Don't try to fill up the silent times. They are important for triggering emotions and memories. Some of the best parts of an interview come after periods of silence.
9. Don't stay longer than the time previously arranged. By the end of one or two hours, both of you will start to get tired.

*\*For more practical tips on how to conduct an interview, please see:*

Brown (1988) *See Chapter 3: Conducting the Interview*

Hoopes (1979) *See Chapter 8: Conducting the Interview & Chapter 9: Asking Questions.*

Seperson and Hegeman (2002) *See Chapter 13: Improving your Interviewing and Communication Skills with Older People.*

## C. Close the Interview

When you finish the interview, show again your appreciation for the interviewee's time and help with your assignment. Tell the interviewee the next steps in the process and what will be done with the information you collected. Offer to give a copy of the tape you recorded at the conclusion of the project, so that he or she can have it as a memento and show it to relatives and friends.

James Hoopes suggests you "write up" your overall ideas and impressions while the interview is still fresh in your mind. How successful was the interview? How did you affect the interviewee? What were your preconceptions before your interview? What are your impressions after the interview? What could have made the process even better?

*For more details on how to close an interview for an oral history project, please see:*

Hoopes (1979) *See Chapter 10: After the Interview*

## **Step 4: PRESERVE**

In this stage, you will develop the information gathered during your interview. It can include your interview notes and/or the audio and video files. This information may be used for your presentation.

### ***OPTIONAL ACTIVITIES FOR THE PRESERVE STAGE***

*Other optional items are a life summary, timeline of significant life events, and or culturagram.*

#### **A. Development of Project Products**

##### **1) Timeline of Significant Events (*optional*)**

A timeline of significant events is a list of important life events presented in chronological order. In the timeline, you can describe personal as well as historical events that you captured during the interview, including information that relates to family, friends, school, religion, and life-stage events. After you develop the timeline, check its accuracy with your interviewee. She or he might even enrich the timeline with more details. Having an accurate timeline will help you develop a summary of your interviewee's life history. For a sample of a timeline of significant events, please see Appendix E.

##### **2) Culturagram (*optional*)**

The culturagram grew out of Elaine Congress's (a Fordham faculty member) experience working with families from different cultural backgrounds. The culturagram (Congress, 1994, 1997) is a family assessment instrument developed to help social workers understand culturally diverse clients and their families.

The culturagram examines the following 10 areas:

- Reasons for relocation
- Legal status
- Time in community
- Language spoken at home and in the community
- Health beliefs
- Crisis events
- Holidays and special events
- Contact with cultural and religious institutions
- Values about education and work
- Values about family—structure, power, myths, and rules

*For more information on how to develop a Culturagram, please see:*

Congress, E. (1994). The use of culturagrams to assess and empower culturally diverse families.

*Families in Society*, 75, 531–540.

Or visit the following Web site for an audio podcast on using culturagrams:

<http://socialworkpodcast.com/2008/12/visual-assessment-tools-culturagram.html>

### 3) Life History Summary

To help you articulate your thoughts on how you want to portray your interviewee's life history, you can start by identifying the different types of events in her or his timeline. You can group types of events as they relate to the different aspects of someone's life, such as personal events (e.g., marriage, birth of children, illnesses, friendships), family events (e.g., death of a relative, parents' divorce), religious (e.g., religious conflicts, religious associations), or historical events (e.g., inventions, poverty, prosperity, wars, social restrictions, change of political regimes, cultural movements).

You can work with these events with a view of micro-, mezzo-, and macro-environment, trying to find the connections between these various aspects in the interviewee's life. One approach that can help you organize the different pieces of information for your summary is to describe the events from the macro- to the micro-environment. For example, a summary can describe how poverty in a foreign country led people to emigrate to look for new opportunities and how that shaped the direction in your interviewee's life. *For more information on how to write your summary, please see:*

Dickson, Heyler, Reilly, and Romano (2006) *See Chapter 4: Feature Article.*

Hoopes (1979) *See Chapter 11: Writing the Paper.*

### B. Preserve Tapes

If you make a tape of your interview, you should make two copies. One copy should be handed in to your instructor. The other set of tapes should be given to your interviewee. You can deliver it personally or by mail, accompanied by a thank-you letter.

## Step 5: PRESENT

The next step involves presenting your oral history project and giving back to your interviewee and community. This section provides an overview of presenting about your experience.

The process of the oral history interview hopefully has been as interesting for you as it has been for your interviewee. Ritchie (1995) observes that the objective of oral history with elderly people is to collect their recollections for the record, but the elderly themselves also gain something from the process. Those involved in reminiscence therapy have observed that this process has therapeutic value for the storytellers, who come away from the experience feeling more positive about themselves and their lives. This process reaffirms to the elderly that their lives have been valuable and productive.

### A. Decide who will present:

You might want to consider inviting your interviewee to do parts of the presentation with you, if you think it will be possible and would be a positive experience for her or him. Or you might consider inviting her or him to be a part of the audience. Appendix B provides presentation participation consent form which will need to be completed at this time. If the interviewee is not able to participate, consider contacting your interviewee after your presentation to share your experience and thank him or her again for participating in your project.

### B. Decide what to present:

Your presentation might be about your interviewee's life history or about her or his culture of origin. If the interviewee has more than one culture, you can choose a culture, based on what was most significant in your interview. You can also make a presentation about how you were affected by this project and how it changed your perceptions about a certain culture and/or older population. You might also want to present a combination of these aspects.

### C. Decide how to present:

There are many different ways to use the information you generated in your project. You can develop a poster presentation in which a written and/or visual report would celebrate your interviewee's life and the events and circumstances that shaped it. At a minimum, this should include a life-history summary, photographs you might have taken of your interviewee, and/or artifacts. Remember that the most important aspect of your presentation is to celebrate the person's life, challenges, strengths, and contributions to the community.

*For more information on presentations, please see:*

Dickson, Heyler, Reilly, and Romano (2006) *See Chapter 7: Presentation*

Ritchie (1995) *See Chapter 8: Presenting Oral History*

## **Step 6: EVALUATE**

This step is a personal final reflection, described as follows:

### A. Final Reflection

Upon completion of your project, it will be important to reflect on your experience. Therefore, each student that participates in the project will complete a short reflection that will be a part of the final class presentation. To guide your reflection, please use the following questions:

*Moving Stories: Final Reflection Guided Questions:*

1. What were your preconceptions about relating to older adults before this project?
2. What were your preconceptions about the interviewee's cultural background before this project?
3. How has this experience changed your views?
4. What was the most valuable information you personally gained during this project?
5. How do you think you affected your interviewee?
6. What do you think are the most positive aspects of this project?
7. What do you think can make this process even better for both students and older adults?
8. What are other important thoughts or feelings you would like to share about your participation in this project?

***OPTIONAL RELECTION EXERCISE***

Students can write a two- to three-page reflection paper using the eight questions above.

***OPTIONAL PROGRAM EVALUATION COMPONENT***

*(students may voluntarily participate in the program evaluation component)*

**B. Program Evaluation Component (optional)**

This project also includes a formal evaluation component that students can choose to participate in. The purpose of the evaluation is to measure how successful this program has been in achieving its goals; specifically, how students' attitudes and cultural competence towards older adults have been affected. At the beginning and end of the semester, students that agree to participate in the evaluation will complete (in class or online) a pre- and post-test survey about their thoughts and feelings about aging, older adults, and their future plans for social work practice with older adults. If you are interested in reviewing these measures, they are available for download at the *Moving Stories* Web site: <http://www.fordham.edu/movingstories>.

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Appendix A  
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**BASW Project Announcement**  
Baccalaureate Experiential Learning (BEL) Project

**Moving Stories:**  
Older Adults Talk about their Experiences Before, During, and After Immigration



**Senior Social Work Students**

**Your senior year provides a unique opportunity to participate in an oral history project with older adults with personal or family histories of immigration.**

**Guided Activity:**

- **Currently a BASW student enrolled in senior year integrative seminar**
- **Learn about conducting oral history interviews**
- **Interview one older adult with a personal or family history of immigration**
- **Present about the experience to your classmates**

**Optional Activity:**

- **Voluntarily agree to participate in a 10-15 minute pre- and post-test questionnaire**

*For further information, please contact your integrative seminar instructor or:*

**Dr. Tina Maschi/Fordham University Graduate School of Social Service  
(212) 636-6633 / [tmaschi@fordham.edu](mailto:tmaschi@fordham.edu)**

This project is funded by the John A. Hartford Foundation through the Council on Social Work Education's Gero-Ed Center.



Appendix A  
(2 of 7)**PROJECT DESCRIPTION FOR BASW STUDENTS**

Baccalaureate Experiential Learning (BEL) Project

Moving Stories:

Older Adults Talk about their Experiences Before, During, and After Immigration

**What is the purpose of this experiential learning project?**

This project is being conducted by a team led by Dr. Tina Maschi (project director/principal investigator) as part of a research project at Fordham University Graduate School of Social Service, through a grant from the Council of Social Work Education and the John A. Hartford Foundation. The project's purpose addresses the need to prepare bachelor's level social work students for culturally competent practice with older adults and their families by learning and then conducting oral history interviews.

**How was I selected?**

All senior year bachelor level social work students are eligible to participate in this project as part of their guided instruction activity in during the fall and spring integrative seminar courses.

**What is an oral history interview?**

Oral history is a process where students encourage older adults to talk about periods of their lives, bringing out vivid stories that recount historical periods through the lens of their emotional and personal accounts. This type of intergenerational project has many benefits; among them, oral history projects create opportunities for students to feel a personal connection to the past and to the life of their community. It enables students to learn how people's experiences were shaped during historical periods in a way that cannot be captured in books and through secondary research. This is achieved through the "face-to-faceness" of the interview which provides the student with an opportunity to truly enter the life, mind and definitions of the other. This process facilitates genuine sharing, empathy, and the realization that both the interviewer and respondent share essential similarities; a process that has been identified as a mechanism that debunks stereotypes and bias.

**What is required to participate?**

If you agree to participate in this project, you would complete a guided instruction activity that has four components. First, you would learn about cultural diversity and how to conduct an oral history interview with older adults from diverse cultures. This component is also required as part of the class content. Second, you would interview one older adult. The oral history interview would take place at the agency of your choice. The interview takes between 1.5-2 hours and would be scheduled at a date and time mutually convenient to you and the older adult in the Fall 2009 semester. You would have to take notes at this interview, including some actual direct quotes of your interviewee. It is optional to audio-tape the interview and to take photographs of your interviewee. Third, in the Spring semester, you would work with the older adult you interviewed to prepare an oral presentation about your interviewee's culture and/or immigration experience, as well as your own experiences with the project, and present it to your class. You would provide a copy of the presentation to the older adult volunteer and your course instructor.

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(3 of 7)

**PROJECT DESCRIPTION FOR BASW STUDENTS**

These project activities would be completed within the 30 weeks that comprise the Fall 2009 and Spring 2010 semesters. Fourth, you could voluntarily participate in an evaluation of this experience and your past experiences with older adults and your future plans by completing an online questionnaire at the beginning of the semester and another at the end of the semester. It would take 10 to 15 minutes to complete each questionnaire.

You can decide to stop participating after each component. In other words, if you participate in the first component of learning how to conduct an oral interview, you can withdraw from the project at that point and not conduct the interview. If you conduct the oral history interview, you can decide that you don't want to prepare the oral presentation. Even if you complete the oral history and presentation, you are not obligated to complete either of the online questionnaires. What is most important for you to know is that your participation is completely voluntary. You can stop at any point (i.e., after the first component-oral history interviews, second component-doing the presentation, or third component-participating in the pre- and post-test survey). Even if you are trained in how to conduct an oral history interview, you can decline to participate in conducting the oral history interview.

**Is participation in the project voluntary?**

Your participation in this project is completely voluntary. That is, while every student will have related course readings and be trained in how to conduct an oral history interview as part of the course, you can decide whether or not you want to conduct the oral history interview with an older adult, give a class presentation, or participate in the pre and post test survey. None of the university services or benefits that you receive now or might receive in the future will be affected in any way if you choose not to participate in the project.

**How will I benefit from participating in this project?**

Participating in this project will teach you how to conduct a culturally competent interview. Conducting an oral history with an older adult will give you an opportunity to work directly with older adults with personal or family histories of immigration.

**Is there any risk in participating?**

During the interview with the older adult you may hear some upsetting stories about his or her life experiences. There is a possibility that you might find something upsetting or feel uncomfortable talking to someone from a different culture of your own. However, most students find participating in an oral history interview of this type to be an interesting and rewarding experience. Also there is the possibility that the older adult you are interviewing may become upset and you will need to respond by referring the older adult to the agency. Please contact agency staff that referred them and/or informing your integrative seminar course instructor, who will be available to students if they have questions or concerns.



Appendix A  
(4 of 7)

**PROJECT DESCRIPTION FOR BASW STUDENTS**

**Will my privacy be protected?**

While the research team will be using the results of pre- and post-test survey results, your name or any identifying information will not appear on any published reports, papers or results. The students who participate in the interviewing will be credited as a group in appropriate documentation of the project. If you do not want your name included you must notify the student's course instructor or Dr. Tina Maschi at 212-636-6633.

**Who can I contact if I have questions after the interview is over?**

If you have questions later on about this study, you may call Dr. Tina Maschi, the project director, at 1-212-636-6633 or via email at [tmaschi@fordham.edu](mailto:tmaschi@fordham.edu). If she is not there when you call, please leave a message and she will return your message as soon as possible.

If you have any questions about your rights as a participant, you may also call, write or email the Institutional Review Board at Fordham University:

Phone number: 1- 212-636-7946.  
Email: [irb@fordham.edu](mailto:irb@fordham.edu)  
Mail: Fordham University Institutional Review Board  
Fordham University  
113 West 60<sup>th</sup> Street, Room 203C, New York, NY 10023



Appendix A  
(5 of 7)

**BASW STUDENTS' CONSENT FORM #1**  
*Return signed copy to Research Assistant/Instructor*

Baccalaureate Experiential Learning (BEL) Project  
**Moving Stories: Older Adults Talk about their Experiences Before, During, and After Immigration**

IRB Stamp of Approval

After reading the information sheet, please check yes or no to the questions below.

1. Have you read the information sheet?     YES     NO
2. Have all your questions about the experiential learning project been answered?  
 YES     NO
3. Do you agree to participate in the first component of this project and receive the oral history training?     YES     NO
4. Do you agree to participate in the second component of this project and conduct the oral history interview with an older adult?     YES     NO
5. Do you agree to participate in the third component of this project and participate in the pre and post test evaluation?     YES     NO

\_\_\_\_\_  
Name of Participant (print)

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date

<p><b>IRB Approval</b> From: <u>April 18, 2009</u> To: <u>April 17, 2010</u>  IRB, Chair</p>
---

Appendix A  
(6 of 7)  
**BASW STUDENTS' CONSENT FORM #1**  
*STUDENT COPY (keep for your records)*

IRB Stamp of Approval

Baccalaureate Experiential Learning (BEL) Project  
**Moving Stories: Older Adults Talk about their Experiences Before, During, and After Immigration**

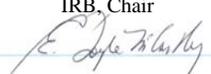
After reading the information sheet, please check yes or no to the questions below.

1. Have you read the information sheet?     YES     NO
  
2. Have all your questions about the experiential learning project been answered?  
  
       YES     NO
  
3. Do you agree to participate in the first component of this project and receive the oral history training?         YES     NO
  
4. Do you agree to participate in the second component of this project and conduct the oral history interview with an older adult?     YES     NO
  
5. Do you agree to participate in the third component of this project and participate in the pre and post test evaluation?     YES     NO

\_\_\_\_\_  
Name of Participant (print)

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date

<p><b>IRB Approval</b> From: <u>April 18, 2009</u> To: <u>April 17, 2010</u> IRB, Chair </p>
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Appendix A  
(7 of 7)

Project Specific Student Notes and Resources

1. “Capturing the Past,” produced by the Statement Centennial Commission (2007). [Web link to Capturing the Past Video.](#)
2. Fordham Contacts:—directory addresses <http://ecampus.fordham.edu/fdaa.nsf>

**MOVING STORIES MEDIA LIBRARY CONTACT  
LINCOLN CENTER CAMPUS**

**Name:** Joseph CAPUTO  
**Campus:** Lincoln Center  
**School:** GSSS  
**Department:** Graduate School Social Service/Administration  
**Title:** Supervisor  
**Tel:** (212) 636-6789  
**Fax:** (212) 636-7876  
**Email:** caputo@fordham.edu  
**Web Site:** www.fordham.edu/gss  
**Building:** Lowenstein  
**Room:** 717B

**MOVING STORIES MEDIA LIBRARY CONTACT  
WESTCHESTER CAMPUS**

**Name:** Aida LAU  
**Campus:** Fordham University at Westchester  
**School:** GSSS  
**Department:** Graduate School Social Services/Administration  
**Title:** Academic Administrator  
**Tel:** (914) 367-3104  
**Fax:** (914) 367-3112  
**Email:** alau@fordham.edu  
**Web Site:** www.alau@fordham.edu  
**Building:** 400 Westchester  
**Room:** 102

3. Digital recorder  
<http://www.sonystyle.com/webapp/wcs/stores/servlet/ProductDisplay?catalogId=10551&storeId=10151&langId=-1&productId=8198552921665364006>

Appendix B  
(1 of 16 pages)

**Student Letter to Older Adult Volunteer**  
Information Sheet, Letter of Interest  
*Please Include a Self-Addressed Stamped Envelope*

Baccalaureate Experiential Learning (BEL) Project  
Moving Stories:  
Older Adults Talk about their Experiences Before, During, and After Immigration

Name of Senior  
Address

Dear Name of Senior:

I would like to invite you to participate in the Fordham University Graduate School of Social Service Baccalaureate Experiential Learning (BEL) Project (Project Director-Tina Maschi). The purpose of this oral history project is to learn about your personal or family immigration experiences. Your name was given to us by \_\_\_\_\_ at the \_\_\_\_\_ agency located in \_\_\_\_\_ because you said you were interested in this project. During October or November, I would like to interview you for about an hour and a half to two hours about your personal or family history of immigration. I am most interested in hearing about what it was like for you (and/or your family) before coming to the United States, the journey to the United States, and what it was like after you and/or your family arrived. I would also like to opportunity to get your feedback on a class presentation about your cultural immigration history. I would be working on this from January to April 2010. You would be invited to come to my class presentation and could participate in my presentation if you so choose.

Participation in this project is voluntary. If you do not want to take part in the interview that is fine and I will not contact you again. If you agree to be interviewed, this does not mean that you have to give me feedback on the presentation or participate in the presentation. If you would like to participate in the interview, I will schedule time at your convenience that we can meet. I also would like to ask you some questions before we meet about your background, including where your family came from, your racial and ethnic background. This will help me to prepare for the interview. If you have any questions, please feel free to contact me at \_\_\_\_\_. I have enclosed a self addressed stamped envelope so that you can return the response to me by mail at your earliest convenience. An information sheet that details this project also is included with the letter that can be kept for your records.

Sincerely,

Name of Student  
Fordham University Bachelor's in Social Work Program



Appendix B  
(2 of 16 pages)

**Letter of Interest**

*Please Include a Self-Addressed Stamped Envelope*

Baccalaureate Experiential Learning (BEL) Project

**Moving Stories:**

**Older Adults Talk about their Experiences Before, During, and After Immigration**

After reading the enclosed invitation letter and information sheet, please respond to the following by checking the box of your choice.

---

Yes, I would like to learn more about participating in the interview. My contact information is:

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_

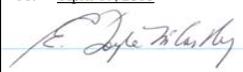
Email: \_\_\_\_\_

I prefer that you do not call me about participating in the interview.

Please return this page in the enclosed self addressed stamped envelope.

BEL Project  
Tina Maschi, PhD, LCSW, ACSW  
Project Director/Assistant Director  
Fordham University Graduate School of Social Service  
113 West 60th Street  
New York, New York 10023

Tel: 212-636-6633  
Email: [tmaschi@fordham.edu](mailto:tmaschi@fordham.edu)

<p><b>IRB Approval</b></p> <p>From: April 18, 2009</p> <p>To: April 17, 2010</p> <p></p> <p>IRB, Chair</p>
---

Appendix B  
(3 of 16 pages)

Baccalaureate Experiential Learning (BEL) Project  
Moving Stories: Older Adults Talk about their Experiences Before, During, & After Immigration  
**Older Adult – Interviewee Information Sheet**  
(Review with interviewee at time of interview with the informed consent)

**What is the purpose of this project?**

This project is part of a seminar class at the Fordham University Graduate School of Social Service. The project is funded by the Council on Social Work Education and the John A. Hartford Foundation and the project director at Fordham University is Dr. Tina Maschi. The purpose is to prepare social work students so they can best help older adults from many different backgrounds. You are invited to participate in an interview with a social work student about your life (or your family's life) prior to, during, and after immigration.

**How was I selected?**

Your name was suggested by \_\_\_\_\_ from the \_\_\_\_\_ agency located at \_\_\_\_\_ to whom you gave permission for us to contact you.

**What is asked of you to be part of this project?**

Initially, you were contacted by a social work student to set up an interview at \_\_\_\_\_ (agency/home/other location) at your earliest convenience. This information sheet provides more information about the project. The interview may take up to 1½ to 2 hours. During the oral history interview you would be asked about your family's immigration history. If you agree, the student will audiotape the interview in order to accurately capture what you say. You may also choose to have your photo taken or to show the student photographs or other personal belongings about you and your history.

If you also want to be involved with helping the student prepare a presentation for his or her class about the interview, this could take a few hours or even up to 10 hours, depending on how much time you want to spend on it. The presentation could include parts of the interview if you agree. You would also be invited to attend the student's presentation to his or her class. The presentation would be about your cultural background with some excerpts from your life or be about your life story.

You don't have to decide now if you want to help with the presentation or attend the class presentation. You can decide about that later on.

**Is participation in the project voluntary?**

Participating in this interview is completely voluntary. If you do decide to participate, you may choose not to answer any questions you do not wish to answer. If you scheduled an interview with the student and change your mind, you can contact the student by phone (PHONE NUMBER) or email (EMAIL ADDRESS) or tell someone at AGENCY \_\_\_\_\_ that you want to cancel the interview. The interview will be cancelled at any time. None of the services or benefits that you receive now or might receive in the future will be affected in any way if you choose not to participate in the study.

Appendix B  
(4 of 16 pages)

**How will I benefit from participating in this project?**

Participating in this project may not benefit you directly, but many people appreciate the opportunity to talk about their life experiences.

**Is there any risk in participating?**

Most people find participating in an interview of this type to be an interesting and rewarding experience. However, during the interview, there is a possibility that you may become upset when you are talking about your past, especially if some experiences were stressful. Please remember that you don't have to talk about anything you don't want to talk about. You can also stop the interview at any time. If you do get upset and want to talk with someone, you can contact your agency staff or the student's course instructor (who are trained licensed social workers).

**Will my privacy be protected?**

Your name will not be used in any way if you choose to have your interview completely private. If you agree to allow the interview to be recorded, the student will provide a copy to you and the original file will be deleted. If the transcript was taped, any names that you do mention will not be included in any typed version. Any stories that you tell that could make it obvious who told them will not be included in any report without disguising the details so you can't be identified. When the student gives a presentation about the interview, you and your family will not be identified. However, some people choose to have their names and photographs as part of the oral history presentation. You also can request for this information to be used. Please see the attached permission form if you choose to be identified. You do not have to decide that now.

**Who can I contact if I have questions about the project?**

You may keep this information sheet for your records. If you have questions later on about this project or at any time before or after the interview, you may call Dr. Tina Maschi, the Project Director/Principal Investigator, at 1-212-636-6633 or at [tmaschi@fordham.edu](mailto:tmaschi@fordham.edu) . If she is not there when you call, please leave a message and she will return your call as soon as possible.

If you have any questions about your rights as a participant in this project at any time before or after the interview, you may also call, write or email the Institutional Review Board at Fordham University:

Phone number: 1- 212-636-7946.  
Email: [irb@fordham.edu](mailto:irb@fordham.edu)  
Mail: Fordham University Institutional Review Board  
Fordham University  
113 West 60<sup>th</sup> Street, Room 203C  
New York, NY 10023



Appendix B  
(5 of 16 pages)

**CONSENT FORM 1: OLDER ADULT VOLUNTEERS**

*(Administer Informed Content at Interview with Information Sheet)*

Baccalaureate Experiential Learning (BEL) Project

Moving Stories:

Older Adults Talk about their Experiences Before, During, and After Immigration

PLEASE CHECK ONE

1. Have you read the information sheet? \_\_\_\_\_ YES \_\_\_\_\_ NO
2. Have all your questions about the project been answered? \_\_\_\_\_ YES \_\_\_\_\_ NO
3. Do you understand that your participation is voluntary? \_\_\_\_\_ YES \_\_\_\_\_ NO

**ORAL HISTORY INTERVIEW**

---

4. Do you understand that you may choose not to answer any questions you do not wish to? \_\_\_\_\_ YES \_\_\_\_\_ NO
5. Do you agree to participate in this project? \_\_\_\_\_ YES \_\_\_\_\_ NO
6. Do you agree to participate in the oral history interview? \_\_\_\_\_ YES \_\_\_\_\_ NO
7. I agree to allow my story to be used for teaching social work students. \_\_\_\_\_ YES \_\_\_\_\_ NO
8. If the student wishes to audiotape the interview, do you agree to the interview being audio taped? \_\_\_\_\_ YES \_\_\_\_\_ NO
9. If the student wishes to videotape the interview, do you agree to the interview being videotaped? \_\_\_\_\_ YES \_\_\_\_\_ NO
10. If the student wishes to take your photograph, do you agree to have your photo taken? \_\_\_\_\_ YES \_\_\_\_\_ NO

Additionally, we will be requesting on a separate consent form if you would like to be available to provide feedback to the student in preparing and/or presenting his or her class presentation.

\_\_\_\_\_  
Name of Participant (print)

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date

<p><b>IRB Approval</b> From: <u>April 18, 2009</u> To: <u>April 17, 2010</u>  IRB, Chair</p>
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Appendix B (6 of 16 pages)  
**PERMISSION FORM FOR USE OF PERSONAL DETAILS**  
Fordham University-Moving Stories Project  
**OLDER ADULT VOLUNTEERS**  
(Administered with informed consent)

Thank you for agreeing to participate in oral history interview for the BEL Project. This is an exciting project for students as it will serve to connect generations within our community. I greatly appreciate your willingness to be a part of this process.

The information gathered in this interview will be used to enhance students' knowledge and ability to work with older adults from different backgrounds. The student that conducted the interview will be giving a class presentation about your cultural history that if you give permission will contain excerpts of your personal story. It will be shared during the final class on \_\_\_\_\_ at \_\_\_\_\_. In this presentation, you have the option to give permission to include information about yourself. For example, if a photograph was taken of you during the interview or direct quotes or verbatim from you can be used. You also have the option to share your story with others by giving permission for your tape to be used to teach students in future classes. Another copy of the tape and any other documentation prepared by the student as a result of our interview will be given to you. You may also choose to have a copy of your tape preserved at Fordham University's BEL Project Oral History Library.

Having read the above, I knowingly and voluntarily permit Fordham University to have full use of the information shared during this interview.

Interviewee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

I give permission to: (*check the appropriate boxes*)

- |  |                                   |
|--|-----------------------------------|
| 1) Use of my name with my materials                  | Yes ___ No ___ Not Applicable ___ |
| 2) Use photograph/s of me                            | Yes ___ No ___ Not Applicable ___ |
| 3) Use photographs of my artifacts/belongings        | Yes ___ No ___ Not Applicable ___ |
| 4) Use of my exact words (verbatim quotes)           | Yes ___ No ___ Not Applicable ___ |
| 4) Use my materials to teach social work students    | Yes ___ No ___ Not Applicable ___ |
| 5) Have my tape preserved in the BEL Project Archive | Yes ___ No ___ Not Applicable ___ |

Interviewee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

As an interviewer, I agree to be polite and courteous throughout the interview process. I will share my completed work with the interviewee.

Interviewer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Instructor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*\* This sample permission form was developed based on the information provided by Dickson, Heyler, Reilly, and Romano in "The Oral History Project – Connecting Students to their Community, Grades 4 – 8"*

Appendix B  
(7 of 16 pages)

**CONSENT FORM 2: OLDER ADULTS**  
**(Administered After the Interview)**

Baccalaureate Experiential Learning (BEL) Project  
Moving Stories:  
Older Adults Talk about their Experiences Before, During, and After Immigration

**PRESENTATION**

---

1. Do you agree to participate in preparing presentation? \_\_\_\_\_ YES \_\_\_\_\_ NO

2. Do you agree to attend the presentation? \_\_\_\_\_ YES \_\_\_\_\_ NO

\_\_\_\_\_  
Name of Participant (print)

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date

<p><b>IRB Approval</b> From: <u>April 18, 2009</u> To: <u>April 17, 2010</u>  IRB, Chair</p>
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Appendix B

(8 of 16 pages)

## **Culturally Competent Oral History Interview Schedule**

**Baccalaureate Experiential Learning (BEL) Project**

*The 'Moving Stories' Project*



### **For Older Adults with Personal and/or Family Histories of Immigration**

Tina Maschi, PhD, LCSW, ACSW

Ana Jardim Messenger

Marina Coleman

September 2008

Fordham University Lincoln Center Campus

113 West 60<sup>th</sup> Street

New York, NY 10023

(212) 636-6633

Email: [collab@fordham.edu](mailto:collab@fordham.edu)

Website: <http://www.fordham.edu/movingstories>

**Baccalaureate Experiential Learning (BEL) Project**

**Moving Stories: Older Adults Talk about their Experiences Before, During, and After Immigration**



**Culturally Competent Oral History Interview Schedule  
For Older Adults with Personal and/or Family Histories of Immigration**

(9 of 16 pages)

(This interview schedule is based on recommendations from Atkinson, 1998; Dickson, Heyler, Reilly, and Romano, 2006; and on the program *The New Americans* (2008) program produced by the Public Broadcasting system for conducting oral history interviews)

Students should try to gather background information on the interviewee during the pre-interview telephone call to your interviewee. If this is not possible, please gather it during your interview.

**BACKGROUND INFORMATION (at pre-interview telephone call is possible)**

Hello and thank you for taking part in this interview. During our talk, I am going to ask you questions about your past and present experience, including your family, friends as well as your immigration experience. In order for me to best prepared for the interview, I would like to first get some background information on you. [Do you have about five minutes to answer these questions now?] Thanks.

<b>PRE INTERVIEW TELEPHONE QUESTIONS: Background Information</b> <i>(please gather this information prior to the interview or at the beginning of the actual interview)</i>	
Now, I am going to ask a few specific questions:	
a. What is your full name (first name, middle name, last name) <i>(include maiden and married name)</i>	
b. What is your gender?	
c. What is your birth date?	
d. What is your ethnic background?	
e. What country were you born? (If U.S., what state?)	
f. Did you immigrate to this country? If so, from what country? <i>(1<sup>st</sup> Generation Immigrant)</i>	
g. Did your ancestors immigrate to this country? If so, who and when? <i>(Descendant of Immigrant/s)</i>	
h. What year did you (or your family) immigrate?	
i. What is your marital status?	
j. How many children do you have?	
k. How many grandchildren do you have?	
l. What is your last grade of school attended?	
m. What religion do you practice?	

**ORAL HISTORY INTERVIEW SCHEDULE**

(10 of 16 pages)

This section is to be completed by interviewer:
Time and Date of Interview:
Interview Place:
List People Present at Interview:

**INTRODUCTION**

Hello and thank you for taking part in this interview. During our talk, I am going to ask you questions about your past and present experience, including your family, friends as well as your immigration experience. This interview will take about 1½ to 2 hours. I am interested to hear your life story in your own words, including your personal or family history of immigration. I would like you to talk freely and spontaneously about your life experiences. If we don't finish today, we can schedule another follow-up interview.

If there are any questions that you would rather not answer, just let me know and we can skip those questions. If you want to take a break at any time, let me know. Also, if you want me to repeat or explain any of the questions, I will be happy to do that. Any questions before we start? If yes: What might they be? If no or after the question is answered: Okay we are ready to begin.

**NOTE TO INTERVIEWERS:**

If your interviewee is 55 year old or older and is a first generation immigrant (i.e., personally immigrated to the United States), use Interview *Schedule I*. We have provided both Short and Long Versions of this schedule. The Short Version consists of six broad questions and the Long Version expands on those questions if you want to probe more deeply in a topic area.

If your interviewee is 55 years or older and was born in the United States and is a descendant of immigrants (second generation or later immigrant), use *Interview Schedule II*. We have provided both Short and Long Versions of this schedule. The Short Version consists of six broad questions and the Long Version expands on those questions if you want to probe more deeply in a topic area.

**Interview Schedule I: Part 1: Short Version**

(11 of 16 pages)

**THE PAST: ORAL HISTORY INTERVIEW FOR FIRST GENERATION  
IMMIGRANTS**

*(Please note: bold print represent the central questions. The Part I Long Version provides additional examples of optional probes if you want to stimulate additional discussion about the topic)*

**This series of questions ask about your life prior to, during, and after immigration.**

**First Generation Immigration Questions**

*The Homeland: Country of Origin*

**1. Tell me about the country that you came from? What about your experiences there?**

*The Journey*

**2. What was the actual journey to this country like?**

*The Arrival*

**3. What was it like when you first reached these shores?**

**4. What is it like for you now?**

**5. What does your culture mean to you? And your family's country of origin?**

**6. Is there anything else you would like to add about yourself, your family or your culture?**

*[Interviewer: There is an optional Part 2 Life History Interview Questions that you can draw from if you seek additional information]*

**CLOSURE**

- 1. Is there anything we left out of your life story that you would like to share?**
- 2. Overall, what has the interview experience been like for you?**

**FINAL COMMENTS**

**Thank you so much for sharing your story with me. I will be back in touch with you to provide a copy of the interview and to plan the next steps of the project. If you have any questions, please feel free to contact me at (fill in your contact information for telephone number and email).**

**Interview Schedule I: Part 1 Long Version**

(12 of 16 pages)

**THE PAST: ORAL HISTORY INTERVIEW FOR FIRST GENERATION  
IMMIGRANTS**

*(Please note: bold print represent the central questions. The long version on the next page has optional probes for each question if you find you would like more information on one of the topic areas)*

**This series of questions ask about your life prior to, during, and after immigration.**

**First Generation Immigration Questions**

*The Homeland: Country of Origin*

**1. Tell me about the country that you came from? What about your experiences there?**

- A. What country are you originally from? (Please tell me about this homeland)
- B. When did you leave? How old were you at that time?
- C. What were the reasons that you (and/or your family) left your country?
- D. What were the conditions in the country when you left?
- E. Who did you leave behind? What did you leave behind?
- F. How did others in your home country treat you when they knew you were leaving?
- G. Why did you or your family choose the United States? Why not some other country?

*The Journey*

**2. What was the actual journey to this country like?**

- A. How did you prepare for your trip here?
- B. How did you or your family get here?
- C. What was the trip like?
- D. Who came with you when you emigrated?

*The Arrival*

**3. What was it like when you first reached these shores?****4. What is it like for you now?**

- A. What were your hopes for yourself (and/or your family) when you came here? Have you realized these hopes?
- B. How were you treated when you first arriving in the US? How are you treated now?
- C. What was your first impression of the United States? Has this initial impression changed over time?
- D. What do you know about your family name? Was your family name changed when you came to this country? What was it? In what language?
- E. What changes in lifestyle did you make when you came here?
- F. What are some of the differences/similarities about the cultures here and in your home country?
- G. Were your expectations of America met? Was your idea the same as the reality?

**5. What does your culture mean to you? And your family's country of origin?****6. Is there anything else you would like to add about yourself, your family or your culture?**

**Interview Schedule I: Part 1 Long Version**

(13 of 16 pages)

**CLOSURE**

**Is there anything we left out of your life story that you would like to share? Overall, what has the interview experience been like for you?**

**FINAL COMMENTS**

**Thank you so much for sharing your story with me. I will be back in touch with you to provide a copy of the interview and to plan the next steps of the project. If you have any questions, please feel free to contact me at (fill in your contact information for telephone number and email).**

**Interview Schedule II: Part 1: Short Version**

(14 of 16 pages)

**THE PAST: ORAL HISTORY INTERVIEW FOR SECOND OR LATER GENERATION IMMIGRANT**

*(Please note: bold print represent the central questions. The long version on the next page has optional probes for each question if you find you would like more information on one of the topic areas)*

**Second or Later Generation Immigration Questions**

**This first set of questions asks about your ancestors experiences immigration experience. That is, prior to, during, and after their arrival to the United States.**

*The Homeland: Country of Origin*

**1. Tell me about the country your family came from? What about their experiences there?**

*The Journey*

**2. What was their actual journey like to this country?**

*The Arrival*

**3. What was it like when your family first reached these shores?**

**4. What is it like for you and your family now?**

**5. What does your culture mean to you? And your family's country of origin?**

**6. Is there anything else you would like to add about yourself, your family or your culture?**

**CLOSURE**

**Is there anything we left out of your life story that you would like to share? Overall, what has the interview experience been like for you?**

**FINAL COMMENTS**

**Thank you so much for sharing your story with me. I will be back in touch with you to provide a copy of the interview and to plan the next steps of the project. If you have any questions, please feel free to contact me at (fill in your contact information for telephone number and email).**

**Interview Schedule II: Part 1: Long Version**

(15 of 16 pages)

**THE PAST: ORAL HISTORY INTERVIEW FOR SECOND OR LATER GENERATION IMMIGRANT***(Please note: bold print represent the central questions. The additional questions are optional probes)***Second or Later Generation Immigration Questions**

**This first set of questions asks about your ancestors experiences immigration experience. That is, prior to, during, and after their arrival to the United States.**

*The Homeland: Country of Origin***1. Tell me about the country your family came from? What about their experiences there?**

- A. What country (or countries) are your family members originally from?
- B. What family member/s left and at what age?
- C. What were the reasons that they left?
- D. What were the conditions in the country before leaving?
- E. Who was left behind? What was left behind?
- F. How did others in your home country treat your family member/s when they left?
- G. Why did your family member/s choose the United States? Why not another country?

*The Journey***2. What was their actual journey like to this country?**

- A. What do you know about their actual journey here?
- B. How did they prepare for the trip here?
- C. How did they get here?
- D. What do you know about what the trip was like for them?
- E. Who came when they emigrated?

*The Arrival***3. What was it like when your family first reached these shores?****4. What is it like for you and your family now?**

- A. What was it like for them when they first reached these shores?
- B. What were their hopes? Have they realized these hopes?
- C. How were they treated when they first arrived in the United States? And now?
- D. What do you know about your family name? Was your family name changed when they came to this country? What was it? In what language?
- E. What changes (if any) in your family's lifestyle was made when they came here?
- F. What are some differences/similarities about the cultures here and in your family's country?
- G. Were your personal and/or family's expectations of America met?

**5. What does your culture mean to you? And your family's country of origin?****6. Is there anything else you would like to add about yourself, your family or your culture?**

**Interview Schedule II: Part 1: Long Version**

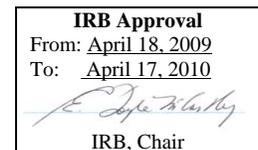
(16 of 16 pages)

**CLOSURE: Is there anything we left out of your life story that you would like to share?  
Overall, what has the interview experience been like for you?**

**FINAL COMMENTS: Thank you so much for sharing your story with me. I will be back in touch with you to provide a copy of the interview and to plan the next steps of the project. If you have any questions, please feel free to contact me at (fill in your contact information for telephone number and email).**

*Suggested citation for this interview schedule:*

Maschi, T., Messenger, A.J., & Coleman, M. (2008). *Culturally competent oral history interview schedule for older adults with personal and/or family histories of immigration*. Retrieved on [month, day, year of retrieval] from <http://www.fordham.edu/belproject>



## Appendix C

(1 of 3 pages)

**Diversity Dimension Module Handout**

First, please review NASW Standard of Cultural Competence (2001) with particular attention to Standards 1–4 available at [http://www.socialworkers.org/sections/credentials/cultural\\_comp.asp](http://www.socialworkers.org/sections/credentials/cultural_comp.asp)

- Standard 1. Ethics and Values—Social workers shall function in accordance with the values, ethics, and standards of the profession, recognizing how personal and professional values may conflict with or accommodate the needs of diverse clients.
- Standard 2. Self-Awareness—Social workers shall seek to develop an understanding of their own personal, cultural values and beliefs as one way of appreciating the importance of multicultural identities in the lives of people.
- Standard 3. Cross-Cultural Knowledge—Social workers shall have and continue to develop specialized knowledge and understanding about the history, traditions, values, family systems, and artistic expressions of major client groups that they serve.
- Standard 4. Cross-Cultural Skills—Social workers shall use appropriate methodological approaches, skills, and techniques that reflect the workers’ understanding of the role of culture in the helping process. (NASW, 2001, para 1)

Second, practical steps you can do to prepare yourself to be culturally competent prior to the interview. Fordham students should review the diversity dimension module. Things to know to be culturally sensitive (Rothman, 2008):

1. The history of your population of interest prior to their arrival in the United States (if any).
2. Immigration and immigration policies pertaining to your population of interest.
3. Your population of interest’s acceptance/integration in U.S. society.
4. Oppression, discrimination, bias, and prejudice that your population of interest has experienced (if any).
5. The country of origin, if relevant, of your population of interest, and the relationship of the United States with that country.
6. Your population of interest’s worldview and beliefs about child rearing, family relationships, dating and marriage, employment, education, recreation, health and illness, aging, death and bereavement, and other life-cycle events.
7. Your population of interest’s relationships with the broader U.S. society.
8. Intragroup variations and differences among your population of interest.
9. Roles of the different generations within your population of interest.

## ***OPTIONAL ACTIVITIES***

These additional *optional* practical steps are particularly useful in preparing for cultural competence based on Rothman (2008). If you complete these optional activities, please do so prior to conducting your oral history interview.

1. Select an older adult for your interview who is an immigrant or descendants of immigrants, preferably one is different from you in race, ethnicity, sexual orientation, religion or worldview, social class, or ability.
2. Explore the history of your interviewee's cultural background, especially the history in North America or the United States, using journal articles, books, the Internet, etc. If possible include demographic information from the U.S. Census Bureau.  
Recommended resource:  
McGoldrick, M., Giordano, J., & Garcia-Preto, P. (2005). *Ethnicity and family therapy*. New York: Guilford Press. (Available as an eBook at Fordham University Library)
3. Read an autobiography, a biography, or a story based on the experiences of a member of this population. For examples of readings see Rothman (2008).
4. View a film by or about the chosen population. For examples of films see Rothman (2008).
5. Attend an event that is culture-specific. Ethnic fairs and festivals, religious services, gay or straight bars, support group meetings, and community events. At the event, observe the reaction of others to you, and yours to them. Look inward to your feelings about this group, and be aware of your sensitivity to others' reactions to your presence.
6. Conduct a practice interview. You can choose a friend, a coworker, or someone you contact for a specific purpose. Ask them about being a member of this population and about their experiences. Please keep this information confidential.
7. Listen to music by or for members of your population. You can choose current and/or historical selections.
8. Process and write about your experience, including assessing any shifts in knowledge and attitudes towards this population of interest.

Rothman's (2008) recommendations to help engagement, trust, and relationship building skills for cross cultural interviewing.

Be prepared before initiating a cross-cultural contact. There are many cultural differences that need to be considered, and that will vary between and among groups. Some of these include:

1. The manner in which contact is initiated-and with whom. In some cultures, it is important to consider the family hierarchy and structure in deciding with whom contact should be initiated.
2. The persons to be included in interview. Certain cultures may have strong taboos against male workers working with female clients alone, or with pregnant women making decisions without a spouse present, or with parents not being present when children are interviewed, or with clients making decisions without family input.

3. Formality and form of address. Other cultures are more formal and informality, common among Americans, may be seen as disrespectful and inappropriate.
4. Eye contact. Eye contact means different things in different cultures: in some, it is a sign of disrespect, in others, it is considered aggressive. Americans tend to use direct eye contact as a measure of relationship and to demonstrate attention, interest, and empathy, and think of its avoidance as a withdrawal and a refusal to engage. When a person does not make eye contact, it is important not to assume that this indicates a lack of interest or connection.
5. Physical distance. The physical distance between individuals varies among cultures. In some cultures, the distance appears to be farther whereas in others it is closer, than our usual habit. It is important to take your cues from your interviewee if he or she seems to back away from you, it may mean that more distance is needed.
6. Physical contact, e.g., shaking hands or patting an arm. The level of physical contact varies between cultures. In some, a pat on the arm or on the shoulder indicates empathy, care, and concern. In others, it is an intrusion. There are also differences between genders in different cultures regarding what is acceptable. Handshakes may be acceptable in some cultures, whereas in others bowing or nodding is the acceptable form of greeting.



## Appendix E

### Online Resources

#### **Aging and Older Adults**

Council on Social Work Education's Gero-Ed Center: <http://depts.washington.edu/geroctr/>

National Institute on Aging: <http://www.nia.nih.gov/>

UNC Institute on Aging: <http://www.aging.unc.edu/>

#### **Cultural Competence**

National Center for Cultural Competence: <http://www11.georgetown.edu/research/gucchd/nccc/>

Center for Effective Collaboration and Practice: <http://cecp.air.org/>

United States Dept. of Health and Human Services: <http://www.hrsa.gov/culturalcompetence/>

#### **Oral History Interviews**

The American Folklife Center: <http://www.loc.gov/folklife/familyfolklife/oralhistory.html>

Center for the Study of History and Memory: <http://www.indiana.edu/~cshmt/techniques.html>

Oral History Research Office: <http://www.columbia.edu/cu/lweb/indiv/oral/index.html>

#### **Immigration**

National Immigration Forum: <http://www.immigrationforum.org/>

American Immigration Center: <http://www.us-immigration.com/>

National Immigration Law Center: <http://www.nilc.org/>

## Appendix F

## Bibliography

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## Appendix G

**FOR ONLINE ADMINISTRATION OF SURVEY ONLY**

(1 of 3 pages)

**Evaluation Component: Invitation Pretest and Posttest**

September 2009

Dear Student,

Dr. Tina Maschi of Fordham University Graduate School of Social Service would like to invite you to participate in the (pretest or post test) evaluation component of Baccalaureate Experiential Learning (BEL) project regarding older adults and immigration. This project is being conducted by the Fordham University Graduate School of Social Service through funding from the Council on Social Work Education (CSWE) Gero-Ed Center and the John A. Hartford Foundation. The information from this evaluation will be valuable to us in shaping social work practice with older adults. If you decide to participate, you will be asked to complete two questionnaires. The first questionnaire asks about your background and knowledge about older adults and should take approximately 10-15 minutes to complete. Then at the end of the semester, if you choose to participate, a follow-up questionnaire of the same length will be distributed. Completing the first questionnaire does not obligate you to complete the follow-up questionnaire.

Your participation in this study is completely voluntary. There would be no consequence to you should you choose not to participate. You may also skip any question you do not wish to answer and you can withdraw from this study at any point. There is no direct benefit to you from participating in this study. The risks are no greater than what would occur in a daily conversation among students. Although we have asked you to place your name on the questionnaire, this information will be removed from the questionnaire (deleted from the dataset) after it is collected and an identification code will be assigned. We ask for your name in order to link this questionnaire with the follow-up if you choose to complete it. All information will be kept confidential. Data will be used only in the aggregate. Your professor will not know who participated in the study and who did not. To voluntarily participate in this survey on line, click on the link below.

For pretest (September): [https://www.surveymonkey.com/s.aspx?sm=BrmDHTxOBV\\_2fTXHHvdgyvdg\\_3d\\_3d](https://www.surveymonkey.com/s.aspx?sm=BrmDHTxOBV_2fTXHHvdgyvdg_3d_3d)For posttest (May): [https://www.surveymonkey.com/s.aspx?sm=tODkRhTqy4V4HFjLOnI4aQ\\_3d\\_3d](https://www.surveymonkey.com/s.aspx?sm=tODkRhTqy4V4HFjLOnI4aQ_3d_3d)

If you have any other questions about this evaluation, please feel free to call Dr. Tina Maschi of Fordham University at (212) 636-6633. If you have any questions about your rights as a research subject, please call the chair of Fordham's Institutional Review Board (IRB) at (212) 636-7946. We sincerely appreciate your taking the time to consider participation in this questionnaire.

Sincerely,

Tina Maschi, PhD, LCSW, ACSW  
Assistant Professor  
Fordham University Graduate School of Social Service  
113 West 60th Street  
New York, New York 10023  
Tel: 212-636-6633/Email: [tmaschi@fordham.edu](mailto:tmaschi@fordham.edu)



Appendix G  
**FOR ONLINE ADMINISTRATION OF SURVEY ONLY**  
(2 of 3 pages)

Informed Consent Form-**Pretest** Evaluation: Students

September 2009

Dear Student,

Dr. Tina Maschi of Fordham University Graduate School of Social Service would like to invite you to participate in the evaluation component of Baccalaureate Experiential Learning (BEL) project regarding older adults and their immigration experiences. This project is being conducted by the Fordham University Graduate School of Social Service through funding from the Council on Social Work Education (CSWE) Gero-Ed Center and the John A. Hartford Foundation. The information from this evaluation will be valuable to us in shaping social work practice with older adults.

Your participation in this pre-test survey is completely voluntary. There would be no consequence to you should you choose not to participate. You may also skip any question you do not wish to answer and you can withdraw from this study at any point. There is no direct benefit to you from participating in this study. The risks are no greater than what would occur in a daily conversation among students. Although we have asked you to place your name on the questionnaire, this information will be removed from the questionnaire (deleted from the dataset) after it is collected and an identification code will be assigned. We ask for your name in order to link this questionnaire with the follow-up if you choose to complete it. All information will be kept confidential. Data will be used only in the aggregate. Your professor will not know who participated in the study and who did not.

If you agree to participate in this evaluation questionnaire, you will be asked to complete an online questionnaire. This is a voluntary, confidential questionnaire which asks a variety of questions about your experiences with older adults. We anticipate that the questionnaire should take you about 10-15 minutes to complete.

If you have any other questions about this evaluation, please feel free to call the project director, Dr. Tina Maschi of Fordham University, at (212) 636-6633. If you have any questions about your rights as a research subject, please call the chair of Fordham's Institutional Review Board (IRB) at (212) 636-7946. We sincerely appreciate your taking the time to consider participation in this questionnaire.

**By placing an "X" in the box below, you have agreed to voluntarily participate in this study.**

**Yes, I agree to participate in this evaluation.**

**No, I decline to participate in this evaluation.**

Tina Maschi, PhD, LCSW, ACSW  
Assistant Professor  
Fordham University Graduate School of Social Service  
113 West 60th Street  
New York, New York 10023  
Tel: 212-636-6633/Email: [tmaschi@fordham.edu](mailto:tmaschi@fordham.edu)

<b>IRB Approval</b> From: April 18, 2009 To: April 17, 2010  IRB, Chair
--

Appendix G  
**FOR ONLINE ADMINISTRATION OF SURVEY ONLY**

(3 of 3 pages)

Informed Consent Form-**Posttest** Evaluation: Students)

Dear Student,

April 2010

We are asking you to consider completing follow-up questionnaire now that the project is completed. The information from this questionnaire will be valuable to us in shaping future educational experiences and social work practice with older adults. If you decide to participate, the questionnaire should take approximately 10-15 minutes to complete.

Your participation in this post-test survey is completely voluntary. There would be no consequence should you choose not to participate. There is no direct benefit to you from participating in this survey. Data will be used only in the aggregate. Although we have asked you to place your name on the survey, the list matching the identifier with your name will be destroyed after the follow-up questionnaires are completed and your name will be removed from the questionnaire. All information will be kept confidential. Your professor will not know who participated in this study and who did not.

If you agree to participate in this evaluation questionnaire, you will be asked to complete an online questionnaire. This is a voluntary, confidential questionnaire which asks a variety of questions about your experiences with older adults. We anticipate that the questionnaire should take you about 10-15 minutes to complete.

If you have any other questions about this study, please feel free to call Dr. Tina Maschi of Fordham University at (212) 636-6633. If you have any questions about your rights as a participant, please call the Fordham University Institutional Review Board (IRB) at (212) 636-7946. Thank you. We sincerely appreciate your taking the time to consider participating in the pre and post-test questionnaire.

**Informed Consent:**

**By placing an "X" in the box below, you have agreed to voluntarily participate in this study.**

**Yes, I agree to participate in this evaluation.**

**No, I decline to participate in this evaluation.**

Sincerely,

Tina Maschi, PhD, LCSW, ACSW  
Assistant Professor  
Fordham University Graduate School of Social Service  
113 West 60th Street  
New York, New York 10023  
Tel: 212-636-6633  
Email: [tmaschi@fordham.edu](mailto:tmaschi@fordham.edu)

<b>IRB Approval</b> From: April 18, 2009 To: April 17, 2010  IRB, Chair
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RAVAZZIN CENTER FOR AGING  
113 West 60<sup>th</sup> Street  
New York, New York 10023  
212-636-6633/tmaschi@fordham.edu

## Appendix H

### BEL Project Staff and Acknowledgements

- Tina Marie Maschi, PhD, LCSW, ACSW, Project Director
- Marina Coleman, Assistant Project Coordinator

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***Moving Stories Project***  
***Fordham University Graduate School of Social Service***  
113 West 60th Street  
New York, New York 10023  
Email: [collab@fordham.edu](mailto:collab@fordham.edu)  
Phone: (212) 636-6633  
Fax: (212) 636-7876  
Web site: <http://www.fordham.edu/movingstories>

***We would love your feedback!***

Feel free to contact us about how useful you have found this project guide at: [collab@fordham.edu](mailto:collab@fordham.edu)