Monograph:
Bornat, J, Bytheway, B, Hadfield, L et al. (2010) Conducting Qualitative Longitudinal Research: Fieldwork Experiences. Working Paper. Timescapes Working Paper Series (2). University of Leeds , University of Leeds. ISSN 1758-3349

https://doi.org/10.5518/200/02

timescapes

An ESRC Qualitative Longitudinal Study

Conducting Qualitative Longitudinal Research: Fieldwork Experiences

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Timescapes Working Paper Series No. 2
ISSN: 1758 3349 (Online) (Print)

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1. Biographical Notes

Joanna Bornat is Professor of Oral History at the Open University. She has a long-standing interest in oral history, ageing and reminiscence and has written and researched on remembering in care settings as well as on older people and family change.

Bill Bytheway is a Senior Research Fellow at the Open University. His research interests include ageing over the life course and qualitative longitudinal methods.

Lucy Hadfield is a Research Fellow at the Open University. Her interests include: family relationships, disability, pregnancy and the body and childhood. Lucy's previous work has explored disability, childhood and children's sibling relationships. She is working on her PhD 'Becoming a Disabled Mother'.

Louise Hemmerman was a part-time Research Fellow at the University of Leeds. She was working on Timescapes project 6 'Grandparents, Social Exclusion and Health'. Since completing fieldwork Louise has been pursuing different projects and is currently working in Spain.

Fiona Shirani is a Research Associate in the School of Social Sciences at Cardiff University. Her research interests include: life course and transitions; fatherhood and families; time and temporality. She is working on her PhD which is about the right time for fatherhood.

Susie Weller is a Senior Research Fellow in the Families & Social Capital Research Group at London South Bank University. Her research interests include: Geographies of childhood and youth; citizenship and participation; family relationships; and social networks.

2. Introduction: Researchers' Experiences

Susie Weller and Fiona Shirani

2.1 Background

This collection draws on the fieldwork experiences of some of the researchers involved in the ESRC '*Timescapes: Changing Relationships and Identities through the Life Course*' programme. Timescapes, the first major Qualitative Longitudinal (QLL)[1] study to be funded in the UK, aims to build a picture of life in 21st century Britain by gathering, archiving and analysing interviews from over 400 people living in a variety of circumstances across the UK.

Temporal understanding is central to the programme. In essence, Timescapes is concerned with the intersection between different dimensions of time and the ways in which temporality shapes and is shaped by the changing relationships and identities of different individuals and collectives. We are exploring how individuals perceive past, present and future, and the relationship between their biographies and wider historical processes. Our work is framed by Barbara Adam's (1998) notion of 'timescapes'. Like a landscape, cityscape or seascape a timescape is a panorama or view of the world in which time is placed as central.

The Timescapes team includes researchers from Cardiff University, Edinburgh University, London South Bank University, the University of Leeds, and the Open University. The programme comprises seven empirical projects that span the life course, from young lives to the oldest generation. Whilst varied in their focus and approach, each project is interested in exploring how people's relationships with family and friends affect their lives and how these relationships change over time. Using a range of methods to explore subjective understandings of life course processes, Timescapes aims to 'walk alongside' project participants, capturing their lives as they unfold.

Three strands relating to archiving, secondary analysis and knowledge transfer interweave and unite the seven projects. The Timescapes Archive seeks to preserve and make available material for future use and analysis by researchers, practitioners and historians. We hope to highlight a range of issues, including ethical and methodological challenges, apparent in archiving QLL research. Secondary analysis will also be completed within/across projects and by external users. For example, connections with national longitudinal quantitative datasets have been established. Finally, Timescapes aims to provide new knowledge and importantly a long-term perspective that will inform policy and practice.

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[1] Throughout this collection we use the term QLL as shorthand, as this highlights both the QuaLitative and Longitudinal aspect of the research, in contrast to the alternative QLR.

2.2 Collaborative work

Timescapes represents a major 'scaling up' of QLL research through both the temporal reach of the study, and breadth of the sample population. Such scaling up is essentially achieved through collaborative working; by linking and sharing data and working together on methodological and ethical issues. The programme is therefore uniquely placed to offer insights into the process of QLL research.

This collection of five papers foregrounds researchers' experiences, reflecting on issues encountered and lessons learnt at various stages of the research process. Timescapes researchers communicate regularly over issues of concern and interest and this volume represents the first of our collective endeavours to document and reflect upon some of the ethical and methodological issues we have encountered during the course of our research. The papers in this collection cover a range of issues including: access and recruitment; attrition and retention; sustaining engagement; researcher continuity and positionality; and archiving.

2.3 Collection overview

Drawing on *Timescapes Project 6 - Intergenerational Exchange, Grandparents, Social Exclusion and Health*, Louise Hemmerman's paper reflects on her experiences of recruiting young grandparents in a low-income locality. The paper explores the practicalities of accessing and sustaining longitudinal samples that are 'hard to keep', reflecting on the complex nature of the researcher/researched relationship in a longitudinal study.

Issues of recruitment are further explicated by Bill Bytheway and Joanna Bornat, who provide a detailed account of the strategies used to recruit members of the oldest generation, in *Timescapes Project 7 - The Oldest Generation: Events, Relationships and Identities in Later Life*. In particular, they focus on the challenges of recruiting twelve volunteer families and the difficulties experienced in meeting diversity criteria with such a group.

Susie Weller follows the theme of sample maintenance in her paper on sustaining young people's engagement. Drawing on *Timescapes Project 1 - Siblings and Friends: The Changing Nature of Children's Lateral Relationships* she contemplates the possibilities and challenges of adopting creative methods and tools to help counter attrition and sustain participants' engagement over time.

In her paper, Fiona Shirani addresses the issue of researcher continuity and change. Reflecting on *Timescapes Project 4 - Masculinities, Fatherhood and Risk: Transition in the Lives of Men as Fathers,* the paper considers both participant and researcher reactions to change, highlighting the challenges and opportunities that this raises. She also considers the significance of personal characteristics to the research relationship.

Finally, Lucy Hadfield considers the position of the researcher in relation to archiving by drawing on experiences garnered in *Timescapes Project 3 – The Dynamics of Motherhood: An Intergenerational Project*. The paper provides both practical insights into the process of preparing QLL data for archive and reflections on the complex set of ethical questions this raises for the researcher.

Different dimensions of time feature in the reflections presented in each of the papers. From discussions surrounding the investment of time required in negotiating access, building rapport, sustaining a sample or preparing data for archiving, through to considerations concerning the timing of recruitment, the significance of adapting to the rhythms of participants' everyday lives and the importance of enabling participants, and indeed researchers, to take 'time out', temporal matters infuse and shape fundamentally researchers' experiences of QLL work.

References

Adam, B. (1998) *Timescapes of Modernity: The Environment and Invisible Hazard,* London: Routledge.

3. Researching the Hard to Reach and the Hard to Keep: Notes from the Field on Longitudinal Sample Maintenance

Louise Hemmerman

Louise submitted her paper to the editors shortly before the end of her employment contract with Timescapes. Due to other commitments she was unable to undertake the necessary revisions to her paper so it was agreed that this would be done by the editors. We take full responsibility for the changes made and hope we have done justice to Lou's work.

3.1 Introduction

This paper draws on fieldwork experiences from *Timescapes Project 6 - Intergenerational Exchange, Grandparents, Social Exclusion and Health*[2] to explore issues surrounding the maintenance of research relationships with a sample of grandparents from a low income locality in West Yorkshire. The study examines young (age 35-55) grandparents' participation in the lives of their grandchildren. We are particularly interested in how grandparents use 'predictive narratives', built from their own life experience in a particular locality, to inform their interventions in the life pathways of their more vulnerable grandchildren. We define these forms of 'rescue and repair' as 'producing futures' (Hughes *et al.,* 2009). Using this work we are seeking to develop our ideas on time and futurity (Adam and Groves, 2007). We are investigating the ways in which exclusion is experienced across time and space. Further we are developing our understanding of social exclusion as a relational process of 'powerlessness and constrained powerfulness' (Emmel *et al*., 2007).

In this paper I share the backdrop of innovative research practice to the project, focusing in particular on accessing and sustaining longitudinal samples who are 'hard to keep'.

3.2 Sample and method

Our sample covers a spectrum of intergenerational support situations ranging from informal daily childcare for grandchildren combined with routine support of young parents, to full-time legally structured custodial care of a grandchild, usually when the parenting relationship has broken down. Some grandparents experienced periods of informal custodial care during the course of the study and still provide extensive support. Legally reinforced custodial care, not always freely chosen, is usually taken on to avoid the grandchild being taken into the care of social services. A longitudinal approach has assisted us in seeing changes in situations and relationships over time, enabling us to document the processes by which grandparents slide into and out of parental responsibility for their grandchildren (Broad, 2001; Clarke and Cairns, 2001; Richards, 2001; Broad and Skinner, 2005).

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[2] The research team comprises Nick Emmel, Louise Hemmerman and Kahryn Hughes and is based at the University of Leeds.

We are working with a case-study methodology and have built eight case studies of grandparents with whom we have conducted four interviews over two years, closely documenting developments in their family lives and social and economic circumstances (Emmel and Hughes, 2009). Our current work is informed by previous research conducted by Nick Emmel and Kahryn Hughes (Emmel *et al.* 2007).

Much of the record of access that informs this paper is based on extensive researcher fieldnotes tracking this process, which are a valuable aid to understanding and documenting access and sampling.

3.3 Theorising the 'problem' of research access

It is well documented how complex and challenging access can be in all research endeavours (Harrington, 2003; Wanat, 2008). In this paper I focus particularly on issues of access in low income localities, working with marginalised individuals and families (Berg, 1999; Popay *et al*., 2003; Sixsmith *et al.,* 2003; Maginn, 2007). Access is not just a case of struggling to reach the people you want in the first place, though that can be hard enough. Access is also about developing sufficient trust and legitimacy in the relationship with the participants to enable them to feel confident in openly sharing their lives and knowledge (Hammersley and Atkinson, 1995).

We have been looking to connect with parents and grandparents who are both very 'visible' through their scrutiny by the media and numerous regulatory agencies, but also 'invisible' in terms of their lack of active consent to engage with such processes voluntarily (Emmel *et al*., 2007). Their wariness and mistrust of 'officialdom' is understandable, but can make them elusive. As researchers we have to encourage participation by building relational bridges to them by routes they trust and to work to earn and return their trust. In this paper I share our experience of building such bridges. Yet as I also show, using the lens of time, these routes to trust can be fragile, subject to change and can also involve considerable researcher vulnerability (Bloor *et al*., 2008). A longitudinal approach makes these relational fragilities very clear, and also helps us to theorise place, the nature of 'bridging' social capital (Blaxter and Hughes, 2000; Putnam, 2000) and the experience of social exclusion itself. In this way method is not separate from theorisation.

3.4 Research access

'You have to go to them; they will not come to you'.

The methods by which you choose to access, and through which you access successfully and unsuccessfully should be integral to an ongoing theorisation of social exclusion. People who are 'socially excluded' are by definition 'hard to reach' through tried and tested first points of call such as public agencies, schools and doctors surgeries, public meetings, advertisements and posters. In our earlier research we learnt that 'passive' advertising of one's presence and invitations to meetings do not always bear fruit. When seeking to understand the process of social exclusion you quickly see such routes largely take you to the easiest to reach in an impoverished locality (Emmel and Clark, 2008). These people include community activists, women who attend toddler groups and generally the more affluent, mobile, healthy and engaged in a community. These potential participants who are drawn to a study through public routes generally reflect the kind of person who has the confidence and 'headspace' to *initiate* contact and who will '*come to you'* as a researcher. It is important to recognise that they are generally not 'socially excluded'. When working with the hard to reach we have learnt that you have to *actively* work to 'go to them' through various relational routes to trust. 'Going to them' is necessary because they do not always have the time, mobility, phone credit or verbal confidence to come to you. This means that as a Qualitative Longitudinal (QLL) researcher you have to be prepared to spend a lot of time building relationships, meeting people and explaining yourself and your aims.

Finding services and agencies

On some of the more isolated and underinvested council estates in the UK, actually finding services on the ground in a specific locality through which you can start to access people is in itself an extensive research exercise for which time has to be allowed. Such an exercise contributed to my understanding of place and locality, and is supported by participants' own evaluation of their impoverishment of supportive services. The extent to which many estates are lacking shops, post offices, health services, leisure facilities, schools and voluntary agency support can be both counterintuitive and hindering. Considerable *rationalisation* and *centralisation* of services in urban locations due to government and local authority policy can also create complexity. It can mean that finding the person responsible for a specific locality, how often they are actually there and where they are based is an exercise in patience as it is not necessarily the case that workers with responsibility for an area are based in the locality itself.

As I will explore further below, this dearth of services on the ground also has implications for relationship maintenance over time, as a lack of agency support, local meeting spaces and communal space within which to base yourself can lead to a 'privatisation' of the research relationship that can make it fragile as all the 'weight' falls on the relationship between the researcher and research subject. We have learned through longitudinal experience that often it is the web of additional support and connections around a research relationship that strengthen it over time. This can include participants knowing one another, sharing service providers, or ongoing relationships between researchers and voluntary agencies. Where this web of relationships is not supported spatially and organisationally this can create difficulties.

Researching across educational distance

There is also the theoretical and practical question of shared cultural and social capital and its role in research practice. From our experience, it is often those gatekeepers who share our social position and motivation who are most likely to be open to supporting our research. Participants and those who facilitate research access best, often value and understand the educational endeavour in which we are engaged and seek to support it, and it is invaluable and self-reinforcing when they do. Nonetheless, those deemed 'educationally engaged' were often not part of our target sample. When working with people who may not have finished secondary school, for whom university is a remote institution and for whom the idea of research has to be carefully explained, recruitment tactics have to be very different. We had to be prepared to answer the question 'what is it you are doing this for again?' several times. The very act of doing research does not have an immediate cultural reference in our locality and the idea of 'research for research's sake' may receive a puzzled look. This brings challenges for the researcher to address, with both local community workers and participants.

Worker's and participant's reasons for participating are also likely to be different when working in a low income locality. In my experience they tend to be oriented towards supporting the community or others in the same situation. It is therefore important to be clear and honest about what your research might offer the community (Popay *et al.,* 2003; Sixsmith *et al.,* 2003). It is likely that they will want and expect the research to 'do' something, and accepting that challenge can be ethically and interpersonally delicate. My fieldnotes record one comment from a gatekeeper:

> *The general tone and discussion is that this is a very underdeveloped area and some money needs to be spent, particularly on youth development. It is hard for them to approach people about research when people might say, what? More questions? What are they going to do?*

Often this is a question we found very difficult to answer.

Finding suitable 'comprehensive' gatekeepers

Once potential agencies you can work with are mapped out, it is possible to move onto selecting and approaching gatekeepers. Researchers interested in social exclusion have to contend with the fact that many of the formal agencies working in impoverished communities have a regulatory and surveillance component to their remit that means they are rarely fully trusted. These 'formal gatekeepers' capacity to enable access is usually restricted for that reason and they are often inward-looking and more concerned with protecting their own activities (Emmel *et al*., 2007). Any organisation that receives government funding is also likely to be working with the very 'categorical' view of social exclusion that we are seeking to develop and challenge, presenting its own difficulties. I experienced such an approach as very 'them and us', explicitly distancing themselves from their clients in order to help them, as this comment from a local housing officer illustrates:

> *'J' then makes a comment that she understands and is interested etc, and that part of their work can be to try and 'break that cycle'. She refers in particular to issues around health and safety and hygiene at home and how it is very difficult to challenge because it is 'their way of life…and it is all they know'.*

Their own discourses and experiences can be very revealing, but not necessarily supportive of critical research.

You can go to other extremes and try and work with people whose approach is much more likely to be 'us and we' when thinking about relationships within the community. Local community activists and 'informal' community gatekeepers are generally trusted by local people, but the extent of that trust means they often take responsibility for protecting their community and for regulating access to the people they work alongside (Emmel *et al*., 2007). These people 'closest to the ground' are also very hard to recruit, particularly if their own networks are not helpful to you. It is for this reason that 'comprehensive gatekeepers' who inhabit a middle ground on the continuum between formal service provision and holistic personal support through doing 'fringe work' (De La Cuesta, 1993) above and beyond their defined role are the most helpful in facilitating research access. It is particularly helpful if they come from a community development and empowerment position. Rather than ‘us and them’ or ‘we’, they are very much more about ‘working *with* and *for*’ and encouraging self-help.

Comprehensive providers have a formally validated ‘right’ to be part of people’s lives, but the relationships they choose to build with people often reflect a broader approach to social need and amelioration. Often they share a good deal of professional, ethical and personal/political ground with social researchers and this is advantageous to the relationship. We have found it extremely helpful to work with health visitors, drugs workers, voluntary support agencies and charities/NGOs. Researchers introduced to participants by ‘comprehensive’ gatekeepers are more likely to reap the benefit of that trust and be trusted themselves. This has been an invaluable finding in our work and informs our research practice within Timescapes.

Accessing the very vulnerable

By definition we are seeking out a section of the population who are defined as marginalised, disengaged and hard to connect with through conventional research routes of access. However, I would argue that there are spectrums of vulnerability even within the experience of social exclusion. There are some people who we simply cannot access, some we should ethically refrain from accessing and some who we may have to expend a lot of time and patience building a relationship with before seeking access. These people often have very little in the way of ‘bridging’ connections (Putnam, 2000) to the social services we tend to use to recruit, and those fragile links that they do have may be potentially punitive. For the team these ‘shaky bridges’ capture the idea of ‘constrained powerfulness’ (Emmel *et al.,* 2007). For a socially excluded person, change in their lives can only be effected by reaching out to someone who has the power to both help and hurt. Assessing which outcome is likely is the risk socially excluded people have to take. A researcher is stepping into that risky place inhabited by several social professionals, and you have to work ethically to show you are a person who will help rather than hurt and that you are a firm bridge. As I will discuss later this has various political and personal implications that need to be carefully managed.

Approaching people who are genuinely struggling, as well as asking whether it is ethical to invite them to participate in research at all, requires awareness that reaching out for support and contact with any outsider can be a vulnerable moment for them. One of our gatekeepers puts it well in this fieldnote about my attempts to access a woman who was struggling to care for her grandchild:

> *‘D’ follows on the (grandparent) story and ‘J’ does too by talking about how people fear reaching out for formal support because they do not want to invite intervention. (Grandparent) will not admit to not coping with (grandson) because she does not want social services coming in and taking him away from her. Is reaching out for help going to cost the person the one thing that they do not want to lose?*

This note captures the way in which the people we are trying to access may have very few ‘bridges’ to forms of trusted support that we might reach them through, and they may keep any ‘bridges’ they have as ‘drawbridges’ that they can rapidly pull up. In this case we were able to reach her through painstaking work with one gatekeeper from the voluntary sector who was working well outside his role to help her. In this way the researcher has to be ethically aware that their link is a tenuous one and, in some cases, a vulnerable one. The right to withdraw should be maintained as a clear ethical principle.

3.5 Sustaining access

Having outlined the theoretical and methodological context to accessing hard-to-reach people, my second aim in this paper is to show how we have developed our past insights from the Research Methods Programme[3] into our *longitudinal* work for Timescapes. It is possible to take the argument about research access still further by introducing the element of time and extended relationship. Clearly working with a sample over time brings new challenges and opportunities. I examine the research implications of seeking to maintain research access over some length of time with people whose lives can be chaotic, unpredictable and vulnerable due to health problems, legal issues, intense support interdependencies, economic lack and violence. This is not just about practical issues such as lost mobile phones and lack of phone credit (though this is a very real issue). We need also to take into account deeper ethical issues about intrusiveness, the researcher's role as listener and how to respond ethically to need while managing the possibility of over-involvement. Tough choices often have to be made about the extent and depth of access required and where to draw ones professional boundaries.

Accepting that research is flexible and continuous

It is important to accept in QLL research that the process of doing the research is going to be both flexible and continuous. There are no clear boundaries where the research period ends and begins. This can take two forms: the need to be continuously 'field ready'; and a willingness to be flexible.

Contact maintenance should be *continuous.* It involves carefully timed letters, cards, phone calls, 'get well' chocolates, recognition of important life events, popping round and spending time on the sofa and in most cases as much face-to-face contact as possible (see also Weller, this volume). Our experiences suggest that it is better to try and see someone every now and again, rather than call them every six months. This approach was more informal and was more likely to fit into the rhythm of our participants' lives than formal and scheduled appointments. Several participants had people drifting into and out of their sitting room all day and were able to accommodate this pattern once familiarity had been established. I also regularly attended support group meetings for grandparents where my participants would also be present, which proved an effective way of keeping in touch.

One of our key findings in relation to temporality and the experience of poverty and crisis is highlighted in our fieldnotes on access and interview cancellation. We steadily learned how our participants experienced the future as unpredictable and the

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[3] See ESRC Methods Briefing 19: Developing methodological strategies to recruit and research socially excluded groups based on research funded as part of the ESRC Research Methods Programme 2002-2007. http://www.ccsr.ac.uk/methods/projects/posters/documents/Emmel.pdf

present as a process of 'fire fighting'. Their life experience of a 'problem just around the corner' often made it hard for them to plan ahead and made them perpetually responsive and reactive to new demands and crises. It made it hard for them to be proactive and feel 'in control' of the future. One of my fieldnotes captures this research experience:

> *I find myself working through in my head what might have been going on and where they might be and adjusting my contact practices accordingly. I find it easiest to contact those who are most stable and rhythmic and least easy to contact those who face the most risk. I am in effect working out their potential futures from what I know was happening last time..*

We had to develop our research plan to be patient and flexible enough to respond to this. This involved two strategies. One was 'striking while the iron was hot' and making appointments as soon as possible. A lack of calendars, diaries and extended future planning meant that an appointment lasted as long as memory and long-term appointments were not possible. Appointments would also be cancelled frequently and a lot of time had to be allowed for the completion of a successful interview in some cases. Our flexibility involved not having any rigid ordering of interviews, allowing participants' time out if they needed it and maintaining contact until full research participation could be revived. In at least three cases these 'time out' allowances enabled participants to continue who might otherwise have withdrawn.

Flexibility also involved doing a good deal of informal researching '*beyond the interview'*. We could not rely on the interview as the main instrument of research and also collected visual data, gatekeeper interviews, extensive fieldnotes, records of access and phone conversations and contextual data. These form the 'cases' upon which our research is based.

The fragility of comprehensive service provision over time and in place

We lost one of our comprehensive gatekeepers early in the study. This fieldnote captures succinctly the reasons why they could not continue to support us:

> *(The health visitors) move to talk a bit about the changes in their work. They talk about how knowing people really well is going out of the window. When they go now they are 'ticking boxes' and they are not able to build the trust and the understanding that they could in the past. There will no longer be an agency in the area to address those kind of relational support needs, not that they necessarily ever have. That's why (local housing NGO) are so important though they only deal with the vulnerable few who have stepped up for help or who have been pushed into it.*

This insight into the changing political landscape contributed to a growing understanding of the fragility of comprehensive service provision when viewed over time and in place. The kind of fringe services that make comprehensive gatekeepers so trusted and vital to access are consistently vulnerable to rationalisation and 'reigning in' by management and funders. In many ways this is related to the categorical and pathological approach to social exclusion that we want to challenge. Tackling social exclusion is not about ticking boxes; it is about fostering access to supportive and empowering relationships that enable change to be effected. These comprehensive workers are a precious resource, for both ourselves and those with whom we work. They cannot, however, be relied upon because there are social and political pressures that consistently contract and fragment the vital relationship building and intergenerational support roles they inhabit.

We have witnessed how our gatekeepers are put under pressure to be ‘reactive’ rather than ‘proactive’ in their service provision. One of our current comprehensive gatekeepers, who was so close to the people he worked with that he would go and hang curtains for them, or attend their family birthday parties, describes the precariousness of his own situation:

> *Funding is a big topic and how ‘D’ is struggling with the centrally controlled funding from the London office and how he feels they could do so much better if he could access local funding. Often local funders will not fund national charities. We go into the whole issue of reactive charities versus proactive community work. He talks about how the (London office) tried to pull them back and get them to stop all their work and to focus on working on the helpline only. They will not even allow them to make the small payment for public liability insurance that would allow the volunteers to go out and make home visits. Their main work is to go out and listen and signpost and offer a cry and a cuddle and some support work (they can no longer do that).*

Our work in the same locality has enabled us to document this process over time. It is an important lesson for longitudinal sample maintenance. Mutually supporting the value of the work of the gatekeepers who, in turn, support our research is good practice, either by supporting their funding bids or by providing access to any research findings that might be of help.

The importance of comprehensive gatekeepers in maintaining samples and in data collection

Mutual support is all the more vital for projects like Timescapes as through our longitudinal work we are developing a growing understanding of how trust, power and reciprocity operate over time in gatekeeping relationships. Research relationships cannot be treated as singular and ‘privatised’, doing so can put undue pressure on both researcher and participant. We have seen how important comprehensive gatekeepers are in maintaining samples as well as in accessing them. They do this by supporting ongoing contact work, engaging in emotional labour and helping to sustain trust over time. Gatekeeper organisations can provide a network of relationships and support that in combination help to sustain the research relationship. However, this creates reciprocity pressures on the researcher to help the organisation in return.

Comprehensive gatekeepers can also be important in facilitating a constant drip-feed of information about participants and their lives, representing important data sources in themselves. Their insight was helpful in developing fieldnotes and a consistent longitudinal developmental narrative, as they could help us maintain a small window on our participants’ lives even when we were not actively in the field. In this way we could sometimes take the pressure off interviews as the main method of data collection. This also allowed us to be able to make judicious decisions about when and how to contact participants, for example, if we knew that something difficult was going on, as the following fieldnotes demonstrate:

We have a bit of a catch up about how Geoff and Margaret and Lynn are and more context as to what has been happening with them. Apparently Geoff and Margaret have been away for a 'randy week' in Blackpool, with their 4500 pounds of back dated benefit. It is explained to me more clearly that their daughter was done for fraud because she was illegally still claiming for the kids when they weren't living with her and Geoff and Margaret were getting nothing because of it. They had to get the police involved and there is also something about them being a refused a loan they were entitled to. They definitely stopped getting the child benefit. They might find out more about what has been going on from Geoff and Margaret tomorrow if they pop in for the Friday session although it is not officially on this week.

The comprehensive gatekeepers provided invaluable resources including spaces and opportunities to meet informally, regular gatherings, access to new contacts, and thoughts on the fieldwork.

Professional boundaries and formal gatekeepers

We have documented how difficult sustaining relationships is without this comprehensive gatekeeper support; when working through informal introduction or formal gatekeepers the longitudinal researcher has to do proportionately more of the contact work, emotional labour and trust maintenance. Such risks of 'boundary blurring' within research on sensitive topics is well-documented (Dickson Swift *et al.,* 2006; Bloor *et al*., 2008). This can involve the researcher opening up the boundaries of their own role and can mean slipping into forms of contact, reciprocity and service provision that help to sustain access but also increase their emotional vulnerability. In a sense the 'fringe work' that is so important to relationship maintenance and trust slips fully into their role, rather than being supported and mediated by the comprehensive gatekeeper. This can facilitate sustained research, but may mean that researchers find themselves sliding into forms of comprehensive provision themselves that they need to remain self-aware about. Here are two examples from my contacts with Sheila, who was not recruited through a comprehensive gatekeeper. One is of me conducting 'fringe work':

I am offered a cup of tea and I accept as Sheila sweeps the debris to join a pile on the kitchen floor. She explains it is the grandkids having been round and 'T' was supposed to come round to help later as it was her kids but she thinks she should look like she has done something. She often comes to mop and still comes to help Sheila bath. I comment on her ongoing mobility problems. She becomes agitated when she realises she has no milk and yells for 'C' upstairs. 'C' protests and I offer to go and get the milk and refuse to take money for such a small thing. Sheila insists on giving me it later but I think appreciates the offer. I pop out with my purse and get four pints of blue top as Sheila asks from the Asian shop around the corner.

The other example is the effect of a potential overstretch of my professional role when Sheila becomes ill and distressed:

(Colleague) respects my decision to offer support to Sheila but thinks that I am taking a risk professionally in that she is not sure what kind and level of support

> *I can provide with competence and I shouldn't overstretch myself. I respond that I feel a QLL study is going to challenge all the boundaries of relationship maintenance and we might have to readdress our usual approach to detachment. I want it not to be a one-way process and to provide reciprocal support where possible. I am not sure not getting over-involved is as easy as with a singular interview.*

This is in contrast to working with comprehensive gatekeepers who can often share the burden and offer support. Comprehensive gatekeepers and researchers also share a tension between their professional boundaries and their personal response to human need, which can be intensified in longitudinal research. One gatekeeper comments humorously about the slippery ground he sometimes finds himself in, which can act as a warning to any researcher:

> *'D' then moves onto telling me a humorous story about his adventures at Geoff's sixtieth birthday party. I am beginning to pick up that 'D' uses humour to temper his feelings and I can tell that this party was a real difficult one for him and that he finds the reliance that Geoff and Margaret have on him really difficult at times. They treat him a bit like family and do not give him any boundaries in terms of time or accessibility (calling him at 10pm on a Saturday). 'D' laughs and tells me he couldn't wait to get out of the party because he rapidly became everybody's social worker and people kept introducing him to people as someone who would help them and it was a bit overwhelming…. He was also aggressively verbally challenged by one of the relatives and accused of being 'one of them fuckin' social workers'.*

Emotional risk and accepting access limits

My fieldwork experience has been one of considerable boundary management and difficulties in extracting myself from the field once so much work has been put into being present. Sometimes of course the boundaries slip, and our very human experience and empathy comes through (Dickson Swift *et al.,* 2006). Longitudinal research involves emotional risk, and raises tough questions about the 'depth' of access that can and should be maintained:

> *These notes will not really indicate the impacts caused. The interview was pleasant, if noisy, the surroundings comfortable. Ruth and I related very well. Indeed it is my liking for her that is partially an explanation. I attribute my reaction to the things that Ruth did not want to say about some awful experiences she has had, and my struggling anxiety and respect for that. There was no space for resolution or catharsis (and writing this I reflect on the 22nd that there was an element of dejectedness that she did not want to confide in me). I was left feeling angry, nosey and intrusive, and aware of my own power combined with impotence and frustration. It is also the cumulative effect of hearing several narratives of this sort.*

Longitudinal work presents challenges in terms of managing the depth and extent of access that can be gained once trust is established, and navigating that boundary between professional roles and friendship. Working over a length of time with people who face multiple challenges in their lives can lead researchers down pathways to disclosure, as trust develops and the research relationship becomes more open and natural. This can be very helpful in terms of gathering rich data over time but there are also key elements of researcher safety that have to be taken into account. These can include: accepting and encouraging non-disclosure of certain events as a way of maintaining professional boundaries; managing and accepting the boundaries of your own expertise and capacity; maintaining a clear focus on the research questions and purpose of the interview; and also being clear to the participant about the limits of your expertise and capacity to help. This is so that trust is not compromised when you cannot deliver. It is also important to ensure that the field researcher has a mentor and access to support when dealing with upsetting material.

3.6 Conclusion: Challenging short-termism ~ 'not parachuting in'

The trust you gain through association with 'comprehensive' gatekeepers pulls you towards a reciprocal loyalty over time. It is not necessarily too simplistic to say that formal gatekeepers are likely to be jaded with research and to view it in the light of the New Labour government's long-term commitment to evaluative research, monitoring, faux public consultation and target setting, with very little connected action. This comment from a local formal service provider in a meeting negotiating access is indicative of the attitudes researchers in communities that have become accustomed to short-term evaluative research are likely to face:

> *The education worker moves the conversation back to the value of research in relation to action and funding, she comments that she knew a researcher called (name) who did loads of work in the area a few years ago with someone called (name). They did loads of data collection on employment, health, families and overcrowded housing. She has not seen her since before she had her daughter but she remembers asking her what was happening and the researcher had said they had got all the information they need and that was that. I wonder who the hell that was and if Nick knows them, and grumble to myself that they have not done the researchers after them any favours in preparing the ground.*
>
> *'C' breaks in and says she thinks this is all really interesting and things but she comments that Timescapes has got nearly 5 million pounds from the government and she can't help but think what that could do practically on the estate and surely the money would be better spent on doing something rather than trying to find out more information. Surely the government and policy-makers have got enough information and should be acting?*

Such comments point to how sociological research relationships are eroded by the difficulties participants face in separating academic research from governmental evaluation research. It is worth making a clear distinction from such research at the start of your project to avoid misunderstanding. It is also worth commenting on funding structures and work practices. I have found that a difficulty that researchers and the voluntary and health workers who form their comprehensive gatekeepers share in common is that their commitment to a community and its people is in conflict with their vulnerable funding structures. This can lead to a frustrating short-termism to their work, and this structure is a challenge to longitudinal research work. Of course it is clear to me that there has to be some ethical limit to working with one particular sample, as people will not want to participate in research indefinitely. However, showing commitment to communities and localities over time can be invaluable and fosters positive forms of action and participatory research. One solution to the dilemma of short-termism is helping to build community-focused partnerships with local workers that are mutually reinforcing and help to sustain longitudinal work. This can include applying for funding together, and also sharing research findings with agencies in ways that help them to evidence their work. I am currently applying for funding with one of our gatekeepers to continue some of my work and I believe this is a positive step.

There are clear indications within our research that longitudinal work is welcome for it can help tackle the short-termism that confounds both research and community work, and enables enduring partnerships to be built between participants, workers and academia. We gain gatekeepers' trust through our expressions of common political ground, and through expressions that supporting the people and communities we are working with is our primary motivation. Yet this expectation can create ethical difficulties around sustained research relationships and managing reciprocity when our research structures cannot support our ethical commitments as this comment captures:

> *'L' says that she thinks we are privileged and she admires our approach and commitment to walking alongside people for a while and listening to them through thick and thin. We are not being extractive and simply pulling out their knowledge and leaving. This is a heartening comment on the value of longitudinal research and sustained relationships. Margaret speaks at length about how much she and Geoff do trust me and how much they enjoy speaking and having me listen to them. This is so wonderful to hear.*

For our participants often it is the idea of helping people, of doing something useful for the community that is the strongest pull to participation. This brings with it ethical responsibilities for continued engagement that again suggest that both local and national dissemination of research and a focus on applicability and policy relevance helps to sustain ongoing research. It is therefore clear that QLL researchers should not promise too much. More positively QLL work represents a step towards the kinds of sustained research partnerships that could bear sociological and political fruit in tackling the problem of access and indeed social exclusion itself.

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4. Recruitment for 'The Oldest Generation' (TOG) Project

Bill Bytheway and Joanna Bornat

4.1 Background

Qualitative longitudinal research (QLL) is based on a continuing relationship between researcher and participant. The general aim is to document and theorise aspects of the lives of the participants and, in particular, to consider the awkward question of how their lives might have been had there been no contact between researcher and participant. Within this context, recruitment has to be seen as an invitation issued by the researcher to the participant and the latter voluntarily choosing to respond positively. In accordance with ethical practice, the participant should be free at this point to decide 'yes' or 'no'. Understanding the dynamics of the moment and, in particular, how the participant responds is crucial for the interpretation of the data that subsequently follows. It is helpful to distinguish two situations: where prospective participants opt in and those where they opt out.

The latter is typified by the street interview. Here the prospective interviewee, when approached by the interviewer, is free to 'refuse'. The interviewer is under some pressure to minimise the number who opt out, and his/her presence at this point may help to swing the decision in favour of participation. Nevertheless, should the interviewee-to-be refuse then this will contribute to the project's 'refusal rate'. Generally survey researchers have attempted to play down the significance of this statistic, arguing that those interviewed approximate to a random sample of the wider population. In many instances however, the reasons why people refuse are associated with the very issues that the project is intended to research. A substantial literature has developed over the years on the topic of random sampling and how the effects of refusals might be minimised (see Gobo, 2004: 405-26).

In contrast, the literature on research methods where participants opt in is less extensive. This is exemplified by research that starts with responses to small adverts ('Volunteers are wanted for research into X. If you are A, B or C, and are interested in taking part, please contact ...'). People who read them and who feel they may meet the stated requirements are free to 'opt in' by contacting the research team. A 'refusal rate' cannot be calculated since no one needs to refuse: those who would be eligible and who choose not to participate, simple ignore the advert – even supposing they read it in the first place. The critical point to appreciate is that the participants of such research are volunteers who, for whatever reason, choose to put themselves forward. What this strategy generates is a purposive sample that can be selected from the volunteers according to criteria that meet the aims of the research. This is the rationale we adopted for *Timescapes Project 7- The Oldest Generation: Events, Relationships and Identities in Later Life*[4] (hereafter, the TOG project) (Silverman, 2000: 104).

[4] The team comprises Joanna Bornat and Bill Bytheway and is based at The Open University.

4.2 The TOG project

The TOG project has been concerned with life processes within and associated with families, and with the consequences of these for the oldest generation. We have a particular interest in how continuities and changes in inter-generational relationships and identities are marked and commemorated.

Our overall aim was to explore how families manage and account for time and change in the context of age and ageing. Our data includes life history interviews, diary entries and photographs. The serendipitous source and nature of the information gathered, through both symbolic as well as literal references, indicates how and why certain family relationships are sustained or change, and with what possible outcomes (in terms of patterns of care and support) for the oldest generation.

4.3 Recruitment

At the outset the TOG project was designed to be 'based on 12 diverse families recruited through the UK-wide Open University (OU) network', with each family including at least one person aged 75 or more (the 'senior') (Timescapes Consortium, 2006). This paper details how we set about this task.

February 2007

We intended the concept of 'diverse' to represent what might popularly be called a 'good cross-section' rather than a set of 'unusual' families. So we agreed a set of targets that were minimal in the sense that we expected few problems in meeting them but, in meeting them, we could then claim in good conscience that the sample is 'diverse' (see Table 1).

Table 1: Targets

The 12 seniors

1) no more than three in any one OU region[5],
2) at least one who is living in a residential care home, and at least one who is living in sheltered or some kind of special housing,
3) at least four who live alone, at least four who live with husband/wife, and at least one who lives with other members of the family or a friend,
4) at least one who has never married,
5) at least one who has no children,
6) at least four men,
7) at least six who are aged 85 or more and at least two who are aged 95 or more,
8) at least one who is registered disabled,
9) at least one who was not born in the UK.

The 12 families

1) at least two where it (or a section of it) is of a Black, Asian or minority ethnic group (BME).

[5] The Open University has 13 regional centres in England, Ireland, Scotland and Wales to support distance learning – please see www.open.ac.uk

2)	at least one where a section of it currently lives abroad,
3)	at least four where it (or a section of it) is from a 'traditional working class background'.

The OU has 4,100 staff along with 8,000 tutors and, in issuing an invitation through its various internal communication networks, we hoped to attract at least 50 volunteers[6]. We decided that once that figure was reached, we would ask them to supply us with information relating to these targets. With this, hopefully, we would be able to select a sample of twelve that met all the targets. Where we were faced with choices, we decided we would pick families randomly. However, we also recognised that it was possible that, despite having as many as 50 volunteers, a particular target might still not be met and that we might need to recruit further families.

In January, a draft invitation was sent to a regional coordinator of the OU's Faculty of Health and Social Care[7] for comment and then a revised version included in its regional newsletter (see Table 2). Two weeks later, on February 1st, the invitation was emailed to the other twelve regional offices.

Table 2: Extracts from the invitation

> Do you live in a family, or know of one, where there's a member who is over 75? If you are then we, that is Joanna Bornat and Bill Bytheway of the OU's Faculty of Health and Social Care, would like to hear from you. [...]
>
> We are looking for 12 families across the UK who would be interested in taking part in this project for a period of 18 months. To be involved means having a family member over the age of 75, who might be living alone, with a partner, or in a care setting. It also means finding another family member, or it could be a close friend or associate, who would be willing to act as a 'recorder'. While the project is running, the older member or 'senior' will be interviewed on two occasions, about their life, and the family's history and heritage. This will be a kind of oral history. Meanwhile the recorder will be asked to carry out three tasks: keeping a diary; taking photographs at key family events and providing some basic information on the generational structure of the family, the members of the oldest generation, and patterns of contact amongst everyone.
>
> We will keep in regular touch with the recorder who, like the senior, will receive a small reimbursement for taking part.
>
> If there's something here that sounds interesting, if you'd like to know more do get in touch with us [...]

Views were expressed about how best to distribute the invitation. In addition to newsletters, the intranet, notice boards, and email circulation lists were all mentioned. There was concern that the invitation might appeal to certain categories of staff and not to others, and that certain sections should be targeted. For example, in regard to Associate Lecturers (ALs) who tutor OU students, one coordinator wrote:

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[6] See also, www.open.ac.uk

[7] The TOG project is based in this Faculty.

What about AL's? We have some people who do tutoring because of caring activity in multigenerational families and it's always nice to draw them in to our work. It means a lot to them.

Some made it clear that different methods of circulating the invitation offered access to different categories. One manager, for example, pointed out that the 'regional all-staff email list' 'will reach secretarial and clerical type staff', but she also pointed out that domestic, maintenance and security staff were externally contracted. However she assured us that they could find a way to communicate with them and we replied that we would welcome that offer. The Scottish coordinator said she would see that the invitation was:

... included in a free magazine that goes out to the care sector in Scotland. I have had a lot of contact with the editor and sales director and they are very good about using OU articles as editorial.

Because the OU network is so extensive, one consequence is that we have no information about how many people received or read the invitation.

March

We prepared an information leaflet which we sent to any person responding to the invitation and, by the end of February, we had received 17 enquiries; six were from one region and the other eleven from eight other regions. There were four regions from which we had no enquiries.

Rather than the geographical distribution, however, we were more concerned that there were no enquiries from anyone employed in the 'manual grades'. On March 16th we consulted a colleague in Human Resources about the possibility of recruiting someone in that category from employees at Walton Hall in Milton Keynes (where the TOG project is based). Recognising that communication may have to be undertaken face-to-face or through third parties, we saw this as a way of ensuring that we covered all social classes. In April, Bill visited the Director of Estates and he agreed to exhibit a poster that was a shortened version of the invitation.

April

In order to review progress in meeting our targets, we sent out an email at the end of March to those who had expressed an interest in seeking more detailed information (Table 3).

Table 3: Request for further information

Thank you again for responding to our invitation. It would be very helpful if you could supply us with answers to the following questions. Please be assured that we will treat the information you give us with absolute confidentiality:

1) You have nominated [Name] as the 'Senior' for the project, but we are also interested to know of other members of the oldest generation in the family. In particular, are there others of [Name]'s generation who [you are] in touch with? (By 'in touch' we mean more than an annual exchange of greetings cards but not necessarily regular face-to-face contact).

2) Regarding the members of the oldest generation, are there (i) any who are living in residential care homes or sheltered housing, (ii) any who are registered disabled, (iii) any who have no children, (iv) any who were not born in the UK, or (v) any who are not living in the UK?

3) Regarding the family, is it, or any section of it, (i) of a Black, Asian or minority ethnic group, (ii) from a 'traditional working class background'.

By April 11th, we had received ten replies, supplying answers to some of these questions and confirming the family's interest in participating. When we matched these ten against the criteria for selection, we had a number of concerns. First we had some difficulty locating the seniors on the map of the OU's regions. So we decided to replace the first criterion with:

- **Revised target 1:** At least one and no more than four from each of the following five regions: South of England; Midlands; North of England; Scotland; and Wales.

We had been provided with sufficient information about the long-term disabling conditions of at least two of the proposed seniors to satisfy the eighth criterion regarding disability. Of more relevance regarding the aim of diversity were the targets for age and ethnicity. First we decided that our target for age was unnecessarily ambitious: we already had one senior aged over 95 and we did not want to expend further time and effort attempting to persuade a second person over that age to participate.

- **Revised target 7:** a minimum of five seniors aged 85 or more, and one aged 95 or more.

We realised that the ninth target for seniors and the first for families were inconsistent, and so we decided we should aim to recruit one BME senior:

- **Revised target 9:** at least one senior who is Black, Asian or from a minority ethnic group.

With these changes, this – the ninth target – was the only one that the ten prospective families did not meet. At this point we sought the assistance of a number of 'go-betweens'[8]. In the following discussion, we have added an 'S' code for all those people who we know were directly approached by these go-betweens about being the senior in a participating family.

Amongst the ten respondents there were two who indicated that their families included African Caribbean people among the older generation, and so we asked about the possibility that they might participate in the project. In one instance, it transpired that all members of the older generation were still living in the Caribbean

[8] We are greatly indebted to these friends and colleagues for their efforts on behalf of the project.

and so were not available for interview. In the other instance, after some discussion, the prospective senior declined (code S1). At the same time, we emailed two ex-colleagues with whom we had worked on previous projects and we had a positive response from one, Yasmin Gunaratnam. On April 20th, Bill had the following email exchange with her:

Yasmin: *Will you be able to make provision for elders who do not speak English? How strict is the age inclusion criteria? I also had a look at the invitation that you sent, the people that I had in mind would find some of it a bit difficult to understand (for example the 'ESRC research consortium', 'social networks', etc). It might be an idea to put something in about whether people who do not speak English can participate. Giving a telephone number might also improve take-up. Just some thoughts!*

Bill: *We have made some provision for translation although I'm not sure of the details. Regarding the age criterion, I think we can be a little relaxed over this if it's a matter of a year or two. Our primary concern is to avoid people in their 60s being volunteered as representatives of 'the oldest generation'. It'll be Joanna however who interviews the seniors. I appreciate that a phone number might be helpful.*

Yasmin: *Interviewing in another language is always difficult. After years of mishap, I do feel it is much better to train up someone as a co-researcher so that they can conduct the interview in the preferred language of the participant. Transcription is more nightmarish of course, and if done properly you need to budget for some 'back translation' to check the quality. The family that I was thinking of are Pakistani, the grandfather can speak some English, but it is not his preferred language. Do you want me to hold back from approaching them? In the meantime, I have just emailed a friend who is of Nigerian heritage with details about your project and will let you know if she is interested. I am not sure exactly how old her parents are but they are fluent in English.*

Bill: *Here's a friendlier version of the invitation, Yasmin. Obviously how the interviews are organised will have to be discussed nearer the time. Please approach your contacts. We're more than happy for them to contact us to discuss things directly.*

Two weeks later, Yasmin emailed us to report that her Nigerian friend (S2) had expressed interest, and that her own father-in-law had 'two possibilities' in his local Asian community whom he was 'chasing' (S3 and S4). S2 initially indicated that her family had decided they would participate and that her father would be the senior. As a consequence we registered them as a 'definite'.

May

At the beginning of May we reviewed responses. By this time, a total of 27 people had volunteered their families. Of these, two had since withdrawn and eight others had not responded to the email sent out on April 11th requesting further information. So we had 17 confirmed volunteers who, between them, had identified 25 possible seniors (three volunteers had nominated both their parents and one other had similarly nominated more than one senior).

In making a selection, we decided that we would not include more than one senior per volunteer. A further complication however was that a married couple had each volunteered their own families. In the interests of meeting the targets we decided to include them both and to consider them to be separate families.

We were pleased and somewhat relieved to be able to select twelve families (including S2) that collectively met all our targets. On May 14th however S2 emailed us to report that her father had 'cold feet'. This meant that our sample, now eleven in number, no longer met the target of including one BME family.

We sought further assistance from go-betweens. The project secretary at that time said she would make enquiries in the Community Centre close to where she lived. She was hopeful that a BME family may be recruited there. Then, in June we received news of the establishment of a BME network in the OU and so we emailed the Policy Officer for Equality and Diversity. He agreed to circulate the invitation and noted that many network members have their own established networks, both personal and professional, ‘so if you have a flyer or leaflet that could be distributed electronically I think that would be useful.'

We informed Yasmin of S2 dropping out and enquired about her father-in-law's progress. She emailed us to ask if we had received any response through his efforts, none we said, but there was a possible family, she said, in her son's school (S5). She took the information sheet to show the daughter who, although seeming 'a bit daunted', said she would talk to her father about it.

July

By the beginning of July, we had made no further progress on any of these fronts. Eleven families had agreed to participate. Rather than delay the start of our fieldwork any longer we began inducting recorders and making appointments to interview the seniors.

In pursuit of a BME senior, we contacted Sally (a pseudonym), a colleague in the Faculty whose husband was African. Although none of the oldest generation in her husband’s family lived in the UK, she put us in touch with two possible volunteers. The first, Ashok (another pseudonym), Asian in origin, indicated that his parents-in-law (S6) and his wife's aunt (S7) might be interested, but there was he said a problem regarding distance: he lived in London and they in Yorkshire. We assured him that this would not be a problem and we could work out some convenient arrangement. In August he replied:

> *My wife and I discussed the project with my in-laws and they are not keen to participate for various valid reasons. My wife's aunt has also declined as she has loads of existing commitments. I then discussed the project with my daughter's mother-in-law and her mother (aged 92) [S8]. She has now moved in with them, so does not live alone and does not meet the criteria. My apologies for not being more helpful.*

We replied that living alone was not an essential criterion and his reply began 'Have had further discussion with my daughter's in-laws and they are not keen to participate'. Ashok continued however, reporting on a further possibility (S9):

I discussed the project with my neighbour yesterday - 82 year old looking after his wife who has dementia. He has come back with a negative response. It appears that the main reason with all in my sample group is the time commitment over the 18 month period recording, etc. as well as a feeling, reading between the lines, that they may not be around in 18 months time. You may wish to adopt an alternative approach - a longer interview at the outset and one after 18 months (assuming they are around) and reducing the diary/record keeping.

This exchange illustrates something of the problems entailed in recruiting through go-betweens. It is a pity that we did not meet Ashok. If we had, we would have emphasised our flexibility regarding participation, and how we had taken account of the possibility that not everyone would 'be around' in 18 months.

Sally's second volunteer was African-Caribbean and she replied indicating that her in-laws 'might be interested' (S10). She asked for more information. This we sent but, despite a number of follow-up emails over the next couple of months, she did not come back to us.

August

At the beginning of August, one of the eleven selected families withdrew. The senior had been interviewed and the recorder inducted but, upon reflection, she had decided she did not want to participate and did not start a diary. Despite this, the family was willing for us to keep and use the interview, and so we decided to class this as a pilot study. Nevertheless this left us with only ten participating families. At this point, we decided that it might be sensible to aim to include more than twelve families in the sample. A further complication arose at the first meeting of our project Advisory Group, where the view was expressed that it was inappropriate to limit ourselves to just one BME senior. We accepted this in principle and, having had one family withdraw already, we could see how vulnerable some of our other targets were to further drop-outs.

We approached two of the seven families that had confirmed their interest in April but who had not been selected. One accepted immediately, and the recorder was quickly inducted and the senior interviewed. The second was still willing to participate but, unfortunately, the proposed recorder, the senior's granddaughter, was ill (S11).

September

At the first Timescapes residential meeting held in May, we had discussed ways of collaborating with colleagues on Project 6 ('Intergenerational Exchange: Grandparents, Social Exclusion and Health'). Their fieldwork was being undertaken with hard-to-reach socially excluded families living in a geographically defined part of a large northern city (see Hemmerman, this volume). At the beginning of September we discussed the possibility that they might recruit a family for our project. This had the advantage that it would ensure that we had at least one senior living in a deprived community. However, having identified a possible family (S12), discussions stalled partly because Project 6 was working with a local organisation that was in effect acting as a go-between. But a further complication was that we had only budgeted for fieldwork with twelve families and recruiting a BME senior remained our top priority.

A colleague agreed to check out contacts associated with the Sikh community in Milton Keynes and Joanna approached two oral historians based in Coventry. They agreed to circulate our invitation through both a community development network and the local BME voluntary sector. The comments of Nermaljit Samra, one of the oral historians, are revealing:

> *They all sounded interested when I told them about the project. I've not heard from anyone. Thanks for sending the information round. It's always a bit of a problem. People like the idea in principle but then don't seem to want to actually get involved.*

By the end of September, we reviewed the state of play. Twelve recorders had been inducted. Six had started their diaries in August and another four in September. And nine seniors had been interviewed. Overall, one family had started and dropped out, ten were fully on board and another one was about to start (the senior was interviewed on October 1st). All our targets were met except the ninth: the BME senior. There had been one further change: one of the original recorders had handed over the task of keeping a diary to her mother-in-law, the daughter of the family's senior (F3). This transfer was achieved comparatively smoothly.

October

Following this review, we checked the budget at the beginning of October and decided that, given the possibility of another drop out, it could cover the extra costs of including a thirteenth family in the study.

We were still hopeful that one of our various go-betweens would locate a BME senior willing to participate. On October 22nd however Nermaljit passed on the following message from an acquaintance (S13):

> *I read your email and thought I may like to take part in your research. My mother is 89, born in Ireland and lives alone in the family home. If you are interested in my family taking part please contact me.*

We expressed interest in this (recognising that the link with Ireland would be an important contribution to our claims to diversity), but an email in November informed us that her mother was unwell and unable to take part.

We approached S11's family again regarding dates for interview and induction. Their response however mentioned problems that the granddaughter would have in acting as recorder. We felt discouraged by this and decided that it would be inappropriate to seek their participation any further.

November

On November 12th, Bill reviewed the history of recruitment (on which this report is based). This is the conclusion he drew:

There are eleven families who are fully participating. In each of these families, the senior has been interviewed and the recorder is keeping a diary and taking photographs. Regarding our revised targets, the only two not met by the eleven are: (1) at least one senior living in 'sheltered or some kind of special housing', and (2) at least one senior who is Black, Asian or from a minority ethnic group.

There are unfinished discussions with three families (S10, S11 and S12) regarding their inclusion in the project. We have decided that we will accept at least one, thereby ensuring that a twelfth family is participating as soon as possible.

Our last communication from S10 was an email on August 18th. Although this was positive there has been no response subsequently to our emails. She may yet surprise us with a positive response and if so this would meet the BME target. If we do not hear from her again, we are still hopeful that one of our various go-betweens will 'engineer' a positive enquiry.

We suspect that a major problem regarding the BME criterion concerns the age criterion. Undoubtedly, there are proportionately fewer BME families where there is a senior who is aged 75 or more, and we know from other research (and from some of the responses to our current efforts) that there is a greater likelihood that members of the oldest generation in BME communities will feel less inclined to participate in social research. Sometimes this is due to language differences, but it may also reflect a withdrawal or sense of exclusion from the 'outside world' and a 'retreat' into the privacy of the family. If this is right, then this of course makes it all the more important that we gain some kind of access to such families and their complex age-related histories of migration, prejudice and survival.

This report was discussed at a team meeting. We recognised that the need to resolve the situation was becoming urgent, and it was decided that Bill should directly approach a colleague in the Faculty who is African Caribbean, and that Joanna would similarly make direct contact with an acquaintance in London.

We had already had tentative discussions with the Faculty colleague. She had suggested we contact another, Ella (a pseudonym) and it was Ella who Bill now approached. This produced a positive response and Ella agreed to raise the possibility with her parents-in-law. This she did and no reservations were expressed. Before the end of the month, her father-in-law had been inducted as recorder. He is 78 years old and living in Milton Keynes. He offered to be the senior as well the recorder. We would have preferred his wife to be the senior but, after some discussion and in fear of further changes of heart, we decided that his suggestion would be acceptable.

4.4 Looking back

At the beginning of 2008, twelve families were fully participating in the project, and the twelve satisfied the targets we had set for diversity (see Tables 4 and 5 below). These twelve families have remained with the TOG sample. Upon completion of the project in September 2009, we are pleased that we managed to recruit sufficient families to fulfil our commitments, and that there is – in our opinion – enough diversity to allow us to make some broad claims regarding the generalisability of our data. Nevertheless, we have a few reservations.

- We have been rather more dependent upon parent/child relations than we had expected, and the interviews and diaries paint what might be described as 'a rosy picture' of inter-generational family life. Our recruitment strategy depended upon there being good relations between the oldest and younger generations.
- One particular consequence is that there is only one senior (F5) who has not parented children. This was one of our targets and in addition her inclusion meant that we met our targets of (a) someone aged 95 or more and (b) someone living in a residential home. Should she have withdrawn – and at times this has been a serious possibility – then the remaining sample would have been failing in respect to all three targets. Apart from the risk of losing her, another consequence of this was that she appears too often in the analysis of our data as 'the odd one out'. We regret that no other senior in the sample meets any of these three targets.
- We were anxious about the social class distribution but, on reflection, we are pleased that there was more variation than was initially evident. When asked, about half the sample claimed a working class origin and perhaps half were 'volunteered' by OU colleagues working in the secretarial rather than academic or managerial sectors. We have little evidence to test this but we suspect that the 'small reimbursement' that we offered may have helped to persuade some families to volunteer, and thereby make the sample rather more diverse than it might otherwise have been.
- Issuing the invitation through the OU, coupled with the voluntary nature of the decision to participate, implies that we have twelve somewhat distinctive families. Given our reliance upon the spoken and written word, it is obvious that families that have no one experienced in articulating what they think and observe will be unrepresented. Moreover, several expressed some personal or familial reason for participating, and it is obvious that participation relies upon a sense of security and someone having time to take on an additional daily chore. In our collaboration with Project 6 we encountered families living highly deprived lives in which the oldest generation was heavily engaged in childcare. It was hard for us to imagine any of these families being able and willing to keep a daily diary and, in any case, there appeared to be few, if any, where anyone in the family had survived to reach the age of 75.
- Although we had budgeted for some expenditure on translation, our invitation made no mention of this. The fact that it was written in English implied an assumption on our part that this would be the language in which fieldwork was undertaken. This perhaps explains some of the difficulties we had in recruiting a BME senior.

Table 4: The TOG families

FAMILY NUMBER	SENIOR'S AGE (2007)	RELATIONSHIP (SENIOR TO RECORDER)	LOCATION RECORDER	LOCATION SENIOR	DATE DIARIES STARTED	FIRST INTERVIEW (2007)
F1	86	Wife	North Yorkshire	North Yorkshire	Aug	Sept
F2	98	Aunt	Edinburgh	Edinburgh	Aug	Sept
F3	87	(1)Husband's grandmother (2) Daughter	(1) Tyneside (2) Sheffield	Sheffield	July	Sept
F4	78	Father	Kincardine-shire	Dundee	Sept	Aug
F5	82	Mother	Edinburgh	London	Sept	Oct
F6	79	Mother	London	West Midlands	July	Oct
F7	78	Self (male)	Milton Keynes	Milton Keynes	Dec	Dec
F8	75	Mother	Orkney Islands	Orkney Islands	Sept	Aug
F9	81	Father	Newcastle upon Tyne	Newcastle upon Tyne	Aug	Oct
F10	89	Father	Gwent	Gwent	Sept	Sept
F11	82	Father	Leicestershire	Essex	Oct	Oct
F12	85	Mother	West Yorkshire	West Yorkshire	July	Sept
F13	89	Mother	Hertfordshire	Hertfordshire	Withdrawn	July

Table 5: The TOG targets

TARGET		INITIAL TARGET	REVISED TARGET	ACHIEVED NUMBER	FAMILIES
SENIOR					
1	**Location**				
	South of England	0-3 in each OU region	1-4	1	F5
	Midlands		1-4	3	F6 F7 F11
	North of England		1-4	4	F1 F3 F9 F12
	Scotland		1-4	3	F2 F4 F8
	Wales		1-4	1	F10
2	**Living arrangements**				
	Care home	1+	1+	1	F2
	Sheltered housing	1+			
3	**Household composition**				
	with family	1+	1+	1	F3
	with spouse / partner	4+	4+	7	F1 F4 F7 F8 F9 F10 F11
	alone	4+	4+	4	F2 F5 F6 F12
4	**Marital status**				
	Never married	1+	1+	1	F2
5	**Children**				
	None	1+	1+	1	F2
6	**Sex**				
	Male	4+	4+	5	F4 F7 F9 F10 F11
7	**Age**				
	85+	6+	5+	5	F1 F3 F10 F12
	95+	2+	1+	1	F2
8	**Disability**				
	Registered disabled	1+	-		
9	**Ethnicity**				
	BME	1+	1+	1	F7
FAMILIES					
1	**Ethnicity**				
	BME	2+	-	3	F6 F7 F10
2	**Residence**				
	Abroad	1+	1+	4	F1 F7 F10 F11
3	**Class**				
	Working class	4+	4+	5	F3 F4 F7 F9 F12

4.5 Conclusions

Textbook discussions about sampling tend to overlook the process of recruitment and the implications that this might have for subsequent analysis. There appears to be an assumption that once a strategy has been devised for selecting participants, it can then be implemented and fieldwork commence. It is as though researchers are unable to cope with questions regarding motivation on top of everything else. Just as survey researchers want to dismiss refusals as inconsequential (i.e. the reasons for opting out), so qualitative researchers tend to overlook the implications of the various reasons why people might choose to opt in.

When we met with the Project 6 team, we were confronted by the fact that the TOG sample leaves substantial sections of the UK population wholly unrepresented. In our recent research on other issues (Bytheway *et al.*, 2000; Bornat, 2009) we have engaged with participants over the age of 75 whose life circumstances were such that there would seem to be little chance that they would ever have been recruited even were they to have a relative on the OU circulation lists.

There are two defences of our strategy. The first is that we were not attempting to represent the entire population of people aged 75 or more. This would be difficult with a sample of 120 never mind one of only twelve. We have addressed the question of how and why people came to volunteer their families, and why and how particular members then agreed to be the senior or the recorder. By implementing our selection criteria we sought to maximise diversity among the twelve, and to minimise the risk of having a sample with a narrow range of basic characteristics.

The second defence is that even though the families may have had positive reasons for volunteering at the time we issued our invitation, this did not necessarily apply at later dates: had they heard about the project a couple of months later say, then there may have been reasons why they would not have reacted so positively. But, because they were already 'in the frame' and had got used to us and what we were expecting of them, then dropping out was not considered. In other words, as a result of a longitudinal strategy we remained in contact with older people and their families in circumstances in which they would not normally have been accessible to research. In particular, two of the seniors died during the course of 2008: the last few months of life is an aspect of old age that tends to be shielded from the gerontological gaze. Moreover, such research that is available is made possible, typically, through collaboration with the health or palliative care services. Through TOG we have gained some insight into the significance of the deaths of the oldest generation for family and friends.

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5. Time(s) to be Creative! Sustaining Young People's Engagement in Qualitative Longitudinal Research

Susie Weller

5.1 Introduction

Qualitative Longitudinal (QLL) research is concerned with connections between time and the textures of social life (Neale and Flowerdew, 2003). As Janet Holland, Rachel Thomson and Sheila Henderson (2006) argue, whilst QLL research takes on many forms, *time* and *change* feature as central elements. By its very nature, therefore, QLL work is ongoing, evolving and requires continuous reflection. The methods used in QLL studies are subject to similar ethical, methodological and practical issues apparent in other forms of research. QLL approaches do, however, present a number of alternative or additional challenges that primarily centre upon maintaining research relationships over a long period of time. 'Attrition' and 'sustaining engagement', therefore, represent two of the greatest concerns. Rachel Thomson and Janet Holland in describing their longitudinal work with young people noted "*…we realised our research design through a combination of adaptation and innovation*" (2003: 234).

'Adaptation' and 'innovation' are also key facets of much 'children-centred' research. Since the mid-1990s, research with young people has witnessed epistemological changes which have challenged traditional research methods and have attempted to deconstruct notions of children and teenagers as passive and incompetent. The direction of this work has developed in response to a number of major criticisms of previous studies in which children's own perspectives rarely featured. Rather, contemporary work, often falling under the auspices of the *New Social Studies of Childhood*, tends to regard children as experts of their own lives (James, Jenks and Prout, 1998; Holloway and Valentine, 2000a/b). Accordingly, many such studies now seek to actively involve young people in project design. Such work has also been at the forefront of developing research practices and methods infused with creativity and innovation that draw upon and incorporate young people's diverse skills and interests (Matthews, Limb and Taylor, 1998; Valentine, 1999; Young and Barrett, 2001; Barker and Weller, 2003a/b).

Drawing on *Timescapes Project 1 - Siblings and Friends: The Changing Nature of Children's Lateral Relationships*[9] - this paper contemplates the possibilities and challenges of adopting creative methods and tools to counter attrition and sustain young people's engagement in QLL research. Utilising personal reflection and participant feedback the paper focuses on three dimensions of the research process: young people's active involvement over time; the challenges of sustaining long-term interest; and the fostering of continuous research relationships.

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[9] The team comprises Rosalind Edwards and Susie Weller and is based at London South Bank University.

5.2 The Study

Our study documents the meanings, experiences and flows of children's prescribed (sibling) and chosen (friendship) relationships. Exploring the lives of over 50 children and teenagers currently aged 12-19, the study tracks how such relationships relate to young people's sense of self as their individual and family biographies unfold. The study draws on samples of children from three previous projects conducted by the *Families and Social Capital Research Group*[10] between 2002 and 2005. Each study was concerned to some degree with children's sibling relationships and friendships.

- **Project one:** *Sibling Relationships in Middle Childhood: Children's Views* was funded by the Joseph Rowntree Foundation and comprised a nationally distributed sample of children aged 7-13 interviewed in 2002/03.

- **Project two:** Conducted alongside project one, *Sibling Practices* formed part of the *Families & Social Capital ESRC Research Group* programme of work. The study explored the sibling relationships and friendships of young people aged 5-21 in 2003/04.

- **Project three:** The *Locality, Schools and Social Capital* project, also part of the *Families & Social Capital ESRC Research Group*, explored young people's (aged 11-13) experiences of moving to secondary school between 2003 and 2005.

As such this original material constitutes Wave One of our current longitudinal work. Participants from all three original studies were invited to take part in two Waves of follow-up work. Waves Two and Three were completed in 2007 and 2009 respectively. Table 1 details the retention rates between each of the Waves.

Table 1 - Re-recruitment and retention

	WAVE TWO Re-recruitment from original studies	WAVE THREE Re-recruitment from Wave two
Duration between Waves *In years*	4-5	2
No. of participants invited	95	52
No. of participants recruited *Original target = 60*	52	45
	RETENTION RATES (%)	
Retention rate *Of those successfully contacted*	78	90
	Number of WITHDRAWALS	
Refusals/withdrawals *E.g. too busy*	15	5
Unable to contact *E.g. moved*	28	2*

[10] The Group is based at London South Bank University.

[*One participant was tragically killed in a car accident]

Three girls and two boys elected not to participate in Wave Three. These young people lived in suburban and rural areas and came from White working- and middle-class backgrounds. We have been unable to re-establish contact with one young man who has moved away from his family home. One participant was tragically killed in a road traffic accident.

Our sample is nationally distributed across urban, suburban and rural areas. Table 2 illustrates the diversity of the sample during Wave Three. Whilst relatively broad characteristics have been used for simplicity the diversity within such categories should be noted. For example, the category 'Asian/British Asian' encompasses those with family backgrounds originating in Bangladesh, India, the Philippines, Mauritius, Uganda and Vietnam.

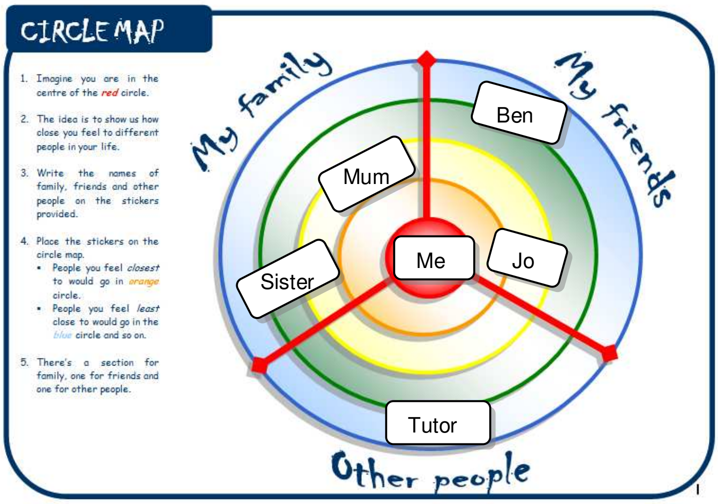
Table 2 - Characteristics of participants during Wave Three (%, n=45)

GENDER		ETHNICITY		SOCIO-ECONOMIC		GEOGRAPHY	
Female	67	**Asian/British Asian**	18	**Working-class**	47	**Urban**	51
Male	33	**Black/Black British**	7	**Middle-class**	42	**Suburban**	27
		White/White British	60	**Socially mobile**	11	**Rural**	22
		Mixed	15				

Whilst our sample undoubtedly captures the views and experiences of a diverse range of young people, boys have been under-represented across each of the Waves. We have, therefore, been particularly concerned with sustaining boys' interest in the study.

Data has primarily been gathered via in-depth interviews with individual young people or small sibling groups, dependent on participant's preferences. Whilst the interview schedule used during each Wave differed, common themes included: significant life events, change and continuity in familial relationships and friendships; routines and responsibilities; and hopes and fears for the future, all within the context of everyday life at home, at school/college/work and in the local community. The interviews incorporated a flexible range of tools such as: vignettes, through which participants were encouraged to explore sibling relationships and friendship at a more abstract level; network maps detailing levels of closeness felt towards different family members and friends (figure 1); and timelines on which participants plotted change and continuity in key relationships. At the beginning of each Wave participants were given a folder containing information leaflets and items to keep such as notebooks and lollipops.

Figure 1 - Example network map



Across all three Waves the ethical and methodological issues involved in research with children and teenagers were afforded significant attention. Issues such as informed consent, confidentiality and anonymity, and power are particularly pertinent in such contexts (Barker and Weller, 2003a/b). Accordingly, we designed a range of leaflets and postcards and developed a website[11] to provide participants with accessible information about the project and wider Timescapes programmes. Consent has been continuously negotiated, verbally at the outset and after the interview. During Wave Three we gained written consent to include participant's anonymised interviews and activities in the Timescapes archive (see Hadfield, this volume).

5.3 Active involvement over time

In many respects 'children-centred' research has now become synonymous with participatory approaches that endeavour to involve young people as 'co-producers' of data (Kellet, 2005; Coad and Evans, 2008). The first dimension of the research process, upon which I would like to reflect, concerns the *active* involvement of participants over the *long-term*.

Involving a panel of advisors

Since the mid-1990s there have been numerous debates surrounding young people's *meaningful* involvement in research (see Hart, 1992). The underlying rationale for democratising the research process stems from an attempt to redress power imbalances between adults and children. A number of factors rendered the active involvement of participants in this study relatively problematic. Ethical predicaments included concerns about confidentiality, anonymity and the collection of personal or sensitive data. There were also practical challenges associated with actively involving those from a nationally distributed sample especially over a considerable period of time. In addition to an Advisory Group comprising practitioners and researchers,

[11] www.lsbu.ac.uk/families/yourspace

during Wave Two we invited project participants to join our Panel of Advisors. Four young people, three girls and one boy from a diverse range of backgrounds, responded positively.

Since the Panel's fruition in early 2008, members have participated in a number of consultancies, playing a key role in providing advice on the design of accessible information leaflets and consent forms, as well as, the overhaul of our project website. Panel members have been contacted at regular intervals either by email, mail or phone, dependent on their preferences. Mindful of other draws on participants' time we were anxious to emphasise that involvement in each consultation was optional. Input from the Panel has been valuable in enabling us to 'grow with' participants as the study progresses, ensuring in particular that the design of materials and the language used *continue* to be appropriate.

Such creative partnerships can, however, prove challenging. In 2009, we invited panel members to comment on two birthday card designs for participants. Whilst such an exercise might seem trivial, gestures such as remembering a birthday appeared important in maintaining contact (see also Hemmerman, this volume). The designs took time to create; the construction of which sought to reflect my interpretations of interests highlighted in the interviews. The first response I received filled me with great disappointment, compelling me to redesign the cards. Lady Loud[12] criticised every aspect of the designs from the colour scheme to the overall image as this short extract highlights:

> *Don't [add] border! [to the first design] Please because it doesn't even suit the wide theme ... the colour is really nice however apart from the one [second design] beneath that is ugly…* (Lady Loud).

Two days later I received more positive comments from Isobel:

> *I think both of your card designs are lovely and very well designed but I prefer the 2nd one because I think it looks more grown up. The other one looks too childish for 12-19 year olds* (Isobel).

Dealing with conflicting or critical feedback can prove challenging as creative endeavours often involve personal and emotional investment. The more negative comments were initially taken as a slight against my interpretations of participant's lives. After some reflection I drew solace in both the changing nature of interests and tastes, as well as, the diversity of young people's perspectives. Drawing on feedback from Isobel and Lady Loud I re-designed the cards to incorporate a simple colour scheme and format that did not make reference to interests.

During the Wave Three interviews we gathered feedback on panel members' experiences of involvement. Whilst a face-to-face encounter may have discouraged participants from talking candidly, panel members appeared relatively open. Some acknowledged a degree of instrumentality, for example, responding to our suggestion that such participation might be beneficial for college, university and job applications.

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[12] Participants chose their own pseudonyms which have been used throughout this paper.

Anne, who was combining a college course with employment felt guilty that she was not always able to dedicate time to the study. Daniel B and Lady Loud, both school students, enjoyed taking part, often responding to consultation calls. Lady Loud valued her role particularly given what she saw as a wider lack of opportunities for young people to participate. Isobel, also a student, sometimes found the consultations a little abstract, compelling greater reflection on what constitutes meaningful participation. The extent to which the panel have been involved in determining the 'bigger issues' of research design should not be overstated and have, to some degree, been limited by the broader programme remit. Furthermore, I would question whether it is reasonable and practical to encourage greater involvement given other draws on participants' time.

The consultations provided invaluable information that challenged some of my assumptions and ultimately shaped, for the better, the quality of materials produced, thus helping to sustain the interest of other participants. We have since invited all project participants to become a 'media contact'. Four girls and one boy have volunteered to consider talking to any journalists who might be interested in the research.

Involving the wider sample

QLL research relies on the continuous engagement of participants over a number of years. Although for researchers, projects are often all-consuming, for many participants research touches upon their lives only fleetingly. We have been eager to maintain an, albeit, 'distant presence' in participants' lives between interviews, wishing to be neither intrusive nor overburdening. In order to foster long-term engagement, we have endeavoured to sustain contact and encourage continuous involvement through a variety of means. Many of these techniques, such as our bi-annual newsletters, have focused on informing participants and their families and friends of our progress. Feedback garnered during Wave Three suggested that many participants enjoyed receiving regular, albeit not too frequent, correspondence. Many were pleased to hear the study was active and that they had not been forgotten, as Nas stated:

> *I like the Newsletter. I like to know what's happening and how you're continuing with projects and stuff; I like to hear about that. I'm a nerd on the sly and I like to read and I keep up with things like that* (Nas).

The newsletters have also enabled us to maintain contact with participants and/or their families who have withdrawn from Wave Three. For example, whilst Cora chose not to participate in a third interview her mother requested copies of future newsletters as she enjoyed learning about the study. We have also distributed postcards advertising our new website and other events related to the project.

Contrary to common perceptions surrounding young people's use of new communication technologies at the expense of more conventional modes, the majority enjoyed receiving correspondence by post as it made them feel important. Indeed, letters and reply slips (supplied with pre-paid envelopes) have proved to be the most effective means of communication. Nonetheless, due to postal problems a minority of participants stated they had not received all our correspondence. As a result we have posted newsletters on our project website that also contains a selection of research findings and links to downloadable reports. The website has recently been updated from a 'child-friendly' format to a design more akin to popular teen-oriented sites, although to date we lack feedback on participants' engagement with the site.

Participants will also continue to be involved over the long-term through the Timescapes 'living archive', which is currently being established to preserve and make available material for future use and analysis (see Hadfield, this volume). In addition to gaining participant's consent to archive their anonymous data, during Wave Three we requested feedback from participants on the inclusion of their interviews and activities. The majority of those who responded described the preservation of their materials for posterity in a positive manner as 'weird', 'funny', 'exciting' or 'cool'. For some, the archive represented a tangible means by which their contribution was being valued. For others, motivations centred on the desire to help people, and in particular enable others to learn from the past, as Carl commented:

> *I do see the potential of this information; how people feel 'cos it will be good ... you just hear on the news and like you say, the Government ... and they just say things and you say 'No, maybe some people think that but not everyone does' ... if people just have an insight into the way people think ... it might not be the way people think in the future but I think it will be good* (Carl).

Some appeared enthused at having their lives documented, whilst others expressed an interest in being able to view or compare their life experiences, as Steven noted:

> *Personally I'd love to, when it's all done, to have a look at what everyone else said; I think it would be interesting just to compare me to someone else my age who lives in a different place* (Steven).

A number of participants were more pragmatic, happy to be involved on the basis that their material was anonymised. To date, we have received consent to archive from all participants who were re-interviewed in 2009 and from 80 per cent (n=5) of those who have withdrawn from Wave Three.

Although regular correspondence and the archiving of participants' materials arguably constitute more passive forms of engagement, they are tangible demonstrations of the continuing use and value of young people's contributions. A greater level of active involvement is somewhat limited by the sensitive nature of some of the work and the level of long-term commitment likely to be required. Moreover, care must be taken not to reify participatory research as the only means of accessing authentic voices (Gallacher and Gallagher, 2005; Uprichard, 2009).

5.4 Sustaining interest over time

Innovation and participation have become central to much 'children-centred' research. In attempting to counter attrition and sustain interest we have developed a number of tools that seek to home in on participant's preferred modes of communication (see also, Thomas and O'Kane, 1999; Barker and Weller, 2003a/b). The second dimension of the research process I would like to explore concerns the challenges of sustaining participants' interest.

Interview tools

The methods used during each Wave have been shaped by a 'toolkit' approach in which participants have been encouraged to select from a wide range of activities as detailed in Table 3.

Table 3 – Optional activities used during the interviews.

TOOLS	WAVE ONE	WAVE TWO	WAVE THREE
Diaries	–	• Life with siblings and friends over a week.	–
Network Maps	• Closeness to family, friends and other people. • Friendship networks at school.	• Closeness to family, friends and other people.	• Closeness to family, friends and other people.
Photography	–	–	• Important spaces at home.
Timelines	• Memories of siblings.	• Change/continuity in sibling relationships and friendships.	• Reflection on Wave Two timeline.
Vignettes	• Siblings. • School.	• Siblings. • Friendship.	• Siblings and friends. • Generation.
Worksheets/ games E.g. Tables, Diagrams and Flowcharts	• Siblings. • Chores. • Rules. • School. • Journeys and places. • Questionnaires.	–	–

Due to the time lapse between Waves One and Two and the challenge of re-establishing contact we drew upon insights gleaned in previous research with young people to develop and refine the activities used in Wave One (see also Hadfield *et al.*, 2005). Since then we have continuously evaluated the use of different tools introducing new activities and also retaining popular and insightful methods. During Wave Three we collected feedback from participants. The majority of responses were encouraging. Some commented positively on the accessibility of project materials, whilst others made suggestions for improvements. The use of activities made for a more relaxed situation and was deemed beneficial in breaking up continuous periods of talk that might otherwise be boring or overwhelming. Activities were of value to those who found aspects of their lives hard to convey verbally enabling different forms of expression, as Rooney reflected:

> *Oh yeah, better than just talking about stuff. You can express yer feelings in many different ways. You can express yer feelings in drawings and you can do it in reading; you can do it in just sitting out there in the rain; let yerself cry, express your feelings that way …* (Rooney).

Visual materials were viewed by some as easier to understand. For the few participants with prior research experience the use of activities compared favourably to previous encounters, as Chelsea and Emma noted:

> *No it's alright. Better than ... other people come to talk to us about things and they just ask us a load of questions … they just sit down and tick boxes and we say 'Yes' and 'No' and stuff ... No this is better!* (Emma and Chelsea).

Particular tools proved popular. The network map enabled participants to organise their thoughts and to reflect upon and evaluate their relationships with others. The vignettes allowed some to explore different perspectives and relate less familiar scenarios to their own lives. During Wave Three many enjoyed looking back at their Wave Two timeline, with some describing the method as an easy but effective way of examining change and continuity in relationships over time. A small minority appeared relatively ambivalent about the tools, whilst several boys found activities that required reading and writing challenging to complete and sought my help or the guidance of a parent or sibling.

In terms of the interview schedules, some believed the line of questioning enabled them to contemplate aspects of their lives they might not otherwise have considered:

> *Sometimes it makes me realise stuff ... Yeah. Cos I don't really think about my sister much but sometimes the talks make me think of her more* (Keira).
>
> *It's interesting that you ask questions and you've never thought about it before* (Richard).

Some found reflecting on the past 'strange', 'funny' and often 'surprising'. Several boys in particular valued the opportunity to talk much to the surprise of their parents who forewarned me that they spoke little at home. Over time many participants sought a greater understanding of the research process by enquiring about different aspects of the project from questions about my experiences of conducting fieldwork and career trajectories through to queries about the processes of transcription, analysis and archiving. Several were more able to relate their involvement to their studies, particularly those taking A-Level *S*ociology or Psychology. A minority appeared less enthusiastic or ambivalent.

Over the nine years I have been conducting research with children and teenagers, advances in communication technologies have evolved beyond recognition, offering many more possibilities for innovation in research design (Hine, 2000; Hewson *et al.*, 2003). There are, nonetheless, a number of challenges. Instant messaging and social networking sites were undoubtedly popular with participants, although it is important to recognise the fluidity of young people's engagement with different technologies over time, as Holly discussed:

> *Facebook is the 'biz' but it's like teenagers are very flighty. First it was MySpace but now it's Facebook …* (Holly).

Keeping pace with such diverse forms of communication has many practical implications for researchers' skills.

It is also important not to essentialise young people's communication preferences. A small number of participants did not have access to a home computer. For those who did, the computer was not necessarily located in a private space within the home, raising challenges for confidentiality in research. Email, participation in social networking sites and so on essentially use conventional forms of communication such as writing that are not universally popular. Moreover, the 'success' of creative methods lies not just with tapping into popular means of communication but also with the contexts in which they are employed. Methods deemed popular or appropriate ways of communicating with friends may not be considered so in the context of research. As we have found many prefer to receive research correspondence by post. Such issues raise many challenges for studies that seek to engage with young people's preferred methods of communication.

Interim activities

Our research is essentially structured around repeat interviews conducted every few years. Sustaining young people's interest in the interim can prove challenging and often involves a considerable investment of time. In addition to regular correspondence and the project website we have developed a range of interim activities designed to: help maintain contact with participants between interviews; promote some of the outcomes of the study to participants, their families and the general public; and to enrich our longitudinal data. Participation in the activities was optional.

Two of the activities, the 'cultural commentary' and 'Your Life: aged 25' exercises were specifically targeted at engaging project participants. The activities were administered by post and email. For completion respondents were offered a £10 voucher. In October 2007, a sample of 20 participants were invited to take part in our 'cultural commentary' activity in which they were asked to explain one of their interests to a researcher exploring the Timescapes Archive in 100 years time. We received 14 responses (70 per cent response rate). A year later, we invited all project participants to complete our 'Your life: aged 25' activity in which they were invited to provide written accounts describing their imagined home life, work and interests at the age of 25. The exercise sought to 'replicate' the pupil's questionnaire completed by 13, 669 11 year-olds in 1969 as part of the British Birth Cohort Study (see Elliot and Morrow, 2007). We received 24 responses (46 per cent response rate).

Three of the interim activities sought to engage not only project participants but also the general public[13]. In March 2008 we teamed up with Bill Bytheway and Joanna Bornat (Timescapes Project 7) to conduct a UK-wide exploration of sibling relationships. Part of the *ESRC Festival of Social Science,* the exercise invited members of the public to complete a postcard telling us about their relationships with their siblings. Postcards were distributed online and through universities, schools and voluntary organisations. During the week-long exercise public response far exceeded expectation both in terms of the quantity of postcards received (793) and also the level of detail, with a significant number providing rich, in-depth qualitative accounts (Bytheway *et al.*, 2008). In 2009 we obtained further funding to work in partnership with the *V&A Museum of Childhood* in London to showcase findings from the exercise. The 'family albums' weekend was designed as a knowledge transfer activity and comprised a series of sibling-oriented workshops run by community artists and storytellers. Almost 1500 visitors accessed the museum during the event, with 127

[13] We were awarded additional funding from the ESRC for each of these endeavours.

actively engaging in the activities. We also gained funding to collaborate with *BBC Memoryshare* to develop a unique online collection of memories of sibling relationships over the past century. Again, the exercise formed part of the *Festival of Social Science.*

During Wave Three we did not directly seek feedback about the interim activities. Rather, some participants chose to mention them stating that, on the whole they had not been time-consuming and that the gift voucher had been appreciated. Some were, however, preoccupied with exams and other commitments and could not afford the time, whilst a small number stated that they did not feel confident enough with their reading and writing skills to participate. One shortfall of the interim activities was their focus on providing written accounts, although at times my assumptions and expectations were challenged when we received responses from those who had appeared reluctant to read or write during interviews.

The interim activities appeared significant in helping to sustain participants' interest. Providing feedback to participants on research outcomes can prove particularly challenging in QLL work which is ongoing and arguably never complete. The public-facing activities not only raised the profile of the research but also helped to demonstrate the value and use of the work. Nonetheless, the implementation of such activities required considerable time and resources to execute.

5.5 Fostering continuous research relationships

Infusing creativity into QLL research is not just important in terms of developing innovative methods of data collection but can also be fruitful in building long-term relationships. The final dimension of the research process I would like to explore concerns the fostering of continuous research relationships. Particular emphasis is placed on the shifting nature of relationships as participants and researchers '*grow older together*'.

Increasing independence

The way in which I, and indeed participants, view and position me inevitably shifts over time. As Robyn Holmes (1998) suggested, being an adult can both aid and hinder research with children and teenagers. Our study documents young people's relationships and identities over time, but as part of my reflexive approach I cannot help but contemplate my own life and am curious to see how participants perceive me as we '*grow older together*'. I am now 31 years-old and very conscious that I am twice the average age of participants. I have also experienced what feels like generational shifts as my parents become amongst the oldest members of my extended family and, as friends of a similar age, have children. Since I first carried out research with young people over nine years ago it has become more apparent that I am no longer regarded as a young(er) person (for earlier reflections see Weller, 2004). Imagine my horror when participants speak of their ancient siblings in their late 20s and enquire whether I am familiar with new technologies and, in particular, social networking sites, as Ashley questioned:

> *Well, I have a thing called 'MySpace'... I don't know if you ever like have known* ...? (Ashley).

Ashley then proceeded to explain MySpace without any prompting. Age or generational positioning are merely two aspects of identity that change and evolve as QLL research progresses.

Over time, researchers' relationships with key actors undoubtedly develop or fade. When we re-established contact with participants in early 2007 we sought verbal consent from both the young people and their parent/s to conduct both the Wave Two and Three interviews. As participants gained greater independence and we became an increasingly familiar presence in their lives we began to correspond with participants directly rather than via their parents. Such an approach proved fortuitous. At the beginning of Wave Three, for example, I was unable, after numerous attempts, to re-establish contact with sisters Allie and Lizzie. I emailed their mother who promptly replied stating that she had asked the girls but they appeared uninterested. She felt they viewed the interview as an activity their mother was organising *for* rather than *with* them and believed I would probably gain a more positive response if I continued to pursue them directly. She suggested an appropriate time to call. On finally establishing contact the sisters seemed relatively keen and willing to participate. Whilst in earlier Waves many parents were instrumental in organising interviews, by Wave Three direct contact often proved more effective. The role of many parents had shifted from 'gatekeeper' to 'enabler/encourager'. Indeed, some parents promoted more autonomous researcher-participant relationships by willingly offering their children's mobile phone numbers; a scenario indicative only of a long-established relationship of trust. Nonetheless, the increasingly autonomous nature of the relationships also meant that some were perhaps more keen to opt out of Wave Three than they had when their parent/s played a more active role.

Sustaining relationships

As part of our QLL work we have been keen to ascertain the extent to which having the same researcher for each stage of data collection has been significant (see also Shirani, this volume). I conducted the fieldwork for project three of Wave One and for the entirety of Waves Two and Three. In 2009 we asked participants for their perspectives regarding the significance of researcher continuity. The majority stated that they would prefer the same researcher for each Wave of data collection for a variety of reasons. Some felt more comfortable, relaxed and at ease with the same person, suggesting that it might be harder to establish a connection with a new researcher for 0each interview. Others felt the same researcher could recognise and relate to aspects of their lives rather than just read from cues, as JazzyB and Felix stated:

> *…it's better to be the same person so you know that they're just not reading off a piece of paper … Yeah it's nice for the same person to come back and say 'You remember what you said' or whatever* (JazzyB).
>
> *I think it's important for me because then I know that you know something and I don't have to explain something again. Obviously you have notes and stuff … Yeah. You recognised the picture of the attic … just things like that makes things easier I guess* (Felix).

Some participants felt they would be likely to divulge less to a new researcher. Nonetheless, few could recall their experiences of Wave One and some felt researcher continuity did not matter a great deal but that it was nice to maintain a continuous relationship.

My practice is framed by feminist understandings of the research encounter as a process marked by the co-construction of narrative in which interaction and reciprocity between researchers and participants is advocated. As time passes, such experiences can often feel something akin to catching up with an old friend, whilst recognising that the research encounter comprises a very particular relationship (Duncombe and Jessop, 2002). During interviews, I generally did not hesitate to offer aspects of my identity sharing, for example, common tastes, interests or experiences. Over time, encounters often became creative processes where aspects of 'sameness' in particular were woven into the discussion in order to establish and maintain trust and rapport. One particular commonality has, of late, presented some challenges. I, not unlike the majority of participants use *Facebook,* albeit intermittently. Whilst sharing my interest would, undoubtedly have fostered rapport and perhaps challenged perceptions of my age or generational positioning, I remain reluctant to reveal my use of *Facebook*. Much of my concern rests with control. Although my *Facebook* profile contains very little detail, what friends or family discuss online or what they include in their own profiles rests outside of my control, raising a number of ethical issues if I sought to communicate with participants using such forums.

In all research encounters the nature of what is divulged is undoubtedly always limited or controlled either consciously or unconsciously. Potential tools such as social networking sites differ in that aspects of the private self are contained and displayed in a public arena and are, importantly, shaped and altered by others. Arguably, creativity, therefore, also infuses the research process in terms of shaping the aspects of self we seek to reveal or hide in different contexts.

The 'success' of QLL research rests not only with sustaining involvement and interest but also with developing long-term research relationships, the dynamics of which are likely to evolve over time.

5.6 Conclusions

Sustaining engagement over the long term features as one of the key concerns for QLL research. In this paper I have sought to contemplate the possibilities and challenges of adopting creative methods and tools to help counter attrition and sustain participants' interest. In addition to personal reflections I have also drawn upon feedback garnered from participants during our Wave Three interviews. Whilst a face-to-face encounter may have discouraged participants from talking candidly, many appeared relatively open and forthcoming providing both positive comments and constructive criticism.

Our experiences to date suggest that QLL research with children and teenagers not only benefits from creativity throughout the research process but also flexibility, adaptation, negotiation and constant reflection (see also Thomson and Holland, 2003). In doing so, the diverse and shifting nature of participants' interests and preferred methods of communication can be recognised enabling materials, tools and encounters to be tailored to individual participants. Indeed, much can also be gleaned from the growing body of work associated with the *New Social Studies of Childhood.*

QLL researchers continuously have to (re)learn and (re)negotiate what is expected and appropriate in different contexts. Creative and flexible approaches are also valuable in helping to sustain and develop research relationships over time. In essence, creativity, innovation and adaptation allow QLL research to '*grow with'* both participants and researchers.

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6. Researcher Change and Continuity in a Qualitative Longitudinal Study: The Impact of Personal Characteristics

Fiona Shirani

6.1 Introduction

The basis of this article is my experience as a researcher on *Timescapes Project 4 - Masculinities, Fatherhood and Risk: Transition in the Lives of Men as Fathers*[14]. Like all studies in the network the project is longitudinal, aiming to explore the subjective experience of personal change through a textured approach to temporality (Thomson *et al*., 2002; Neale and Flowerdew, 2003), in our case across the transition to fatherhood. The longitudinal aspect of the project deepens our understanding of contemporary fatherhood by providing a 'long view' (Thomson, 2007) as we follow the continuities and fluctuations in men's ideals and behaviour over their child's early life, both intensively (three times over the first year) and extensively (once eight years later). Time is an explicit element of longitudinal research (Corden and Millar, 2007; Lewis, 2007) as Qualitative Longitudinal Research (QLL) provides the ability to track individual lives through time (Elliot *et al*., 2008) linking time to texture to consider the intricacies of human lives (Neale and Flowerdew, 2003).

Despite mounting interest in recent years, comparatively little has been written on the process of conducting QLL research. Existing accounts – a large proportion of which are based on the 'Inventing Adulthoods' research study – stress the importance of maintaining researcher continuity over the course of a longitudinal project. The purpose of this is to sustain a high-quality research relationship that will facilitate rapport with participants, enabling participants to talk freely. Also continuity provides accumulation of analytic insights and saving preparation time due to increased familiarity with participants (Daniluk, 2001; Thomson and Holland, 2003; Holland *et al*., 2006)[15]. As Saldaña (2003:27) notes

> *It is preferable to maintain continuity for participants and to maintain consistency of data gathering by assigning the same researcher or same team members to particular participants or field site throughout a longitudinal study.*

However, in Project 4, as in other Timescapes studies, such continuity was impossible with all participants due to staff changes. In this paper I reflect on the experiences – from both researcher and participant accounts – of conducting QLL with multiple interviewers, in contrast to those cases where continuity was possible. Having different interviewers also offers us the opportunity to reflect on the researcher's involvement in the production of data, considering the extent to which participants respond differently to each interviewer, which I also explore in this paper.

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[14] The team comprises Karen Henwood, Fiona Shirani and Carrie Coltart and is based at Cardiff University.
[15] See also the 'Inventing Adulthoods' Website - www.lsbu.ac.uk/inventingadulthoods

6.2 The study

The 'Men as Fathers' data comes from two sample groups; the first is a group of thirty men from East Anglia (EA) who became fathers for the first time in 2000. The men were aged between 20 and 40, in a range of relationship situations and from varying occupational backgrounds. These men were interviewed once before and up to twice within the first year after the birth of their child. All of these interviews were conducted by the same female researcher (JP). Eight years later nineteen of these men were re-interviewed when their first child was eight years old, the majority by a male researcher (MF) whilst I (FS) conducted the remainder. This meant that all participants who continued with the study had the experience of being interviewed by two different researchers. By conducting interviews in relatively quick succession during the first year we hoped to consider a more immediate and 'as it is happening' sense of change and development (McLeod, 2003) in addition to a longer-term perspective provided by the revisits eight years later.

The second sample is a group of fifteen men from South Wales (SW) who became first-time fathers in 2008, again interviewed three times. These men were aged between 15 and 40 and also from a diverse range of occupations and relationship situations. Half of the initial interviews in this group were conducted by a male researcher (MF), whilst I (FS) carried out the remainder. I also carried out all of the second and third round interviews with this sample. This meant that half the South Wales sample had two different interviewers whilst the other half had a continuous researcher.

In their final interviews participants were asked to reflect on their experiences of the research, particularly how they felt about dis/continuity of the researcher, data which I draw on for this paper. I have also used fieldnotes from our own reflections on interviews and comments from participants after recording had stopped, as well as drawing on transcripts to consider differences in responses between interviewers. Extracts are marked with the participant's pseudonym, sample and interview wave and interviewer's initials.

6.3 Reacting to the interviewer

It has been suggested elsewhere that when the researcher is female it is useful to contemplate how participants may have responded differently to a man and vice versa (Pini, 2005). In this section I reflect on how interviewees may have reacted to the three researchers differently, as well as considering the continuities between accounts. Whilst gender is an important issue, there are many variant 'personal characteristics' (Plummer, 2001; Ryan, 2006) which participants may react to and need to be taken into account, although there is not the space to consider all of these here. However there did appear to be some subtle differences in responses according to the interviewer's gender.

Several times men expressed comments that could be interpreted as sexist and when being interviewed by female researchers tended to pre- or post-fix this with "I'm not sexist but …" which never happened with the male interviewer.

Yeah I think it is easy to be a natural mother than it is to be a natural father. Which it shouldn't be, it shouldn't be and it is probably sexist of me to say that there is such a thing as a natural mother (Christian, EA interview 2, JP).

But you don't get any recognition of it I don't get any extra pay for it I don't get anything for it. And it makes me wonder if it was a female if she would handle you a little bit different, and that is not being sexist because I am not a sexist (Malcolm, EA interview 2, JP).

But you know your daughter I think you always look at, don't get me wrong it's probably a sexist opinion but I think you always look at girls as being more vulnerable than boys. But that's the way I am I'm afraid (Joe, SW interview1, FS).

When making these comments it was often with an air of apology, that it was not necessarily the right thing to say to a female researcher (Arendell, 1997; Gattrell, 2006). When the interviewer was male there were no instances of any attempts to justify answers, the word sexist was never mentioned. It is likely that the men felt able to express comments that could be interpreted as sexist to a female researcher because they subsequently had the opportunity to explain their response and articulate a justification in the shared understanding of the interview (Williams and Heikes, 1993) highlighting the benefits of qualitative interviewing. The sex of the interviewer therefore did not necessarily appear to inhibit participants' responses, as they expressed similar sentiments, but altered the frame within which they were presented.

After the final interview with the South Wales sample, participants were asked to reflect on their experiences of the research, including any preferences they had for speaking to a man or a woman. Around two thirds of the sample apparently did not mind, whilst the rest preferred speaking to a woman. The reasons they gave for this were generally about finding it easier to express emotions to a woman, therefore feeling less reserved. Men who had spoken to both male and female interviewers (like William) and those who had spoken to a female researcher only (like Joe) were equally likely to express these sentiments.

I think it's probably easier to talk to you than it is a man about these things. Just because get two men in a room talking soppy things about being a dad is probably a little bit more reserved. But I did that stage before Poppy was born. So if anything it's probably a little bit easier to talk to yourself I would say (William, SW interview 3, FS).

You let your guard down a bit more with a woman 'cause you feel you can. (Joe, SW interview 3, FS).

A small number of men said that they had been concerned about speaking to a male interviewer and had contemplated cancelling their interviews because of this. These comments only came to light after the interview had taken place so the researchers were unaware at the time and all interviews went ahead as planned. However after the interviews with these men they all said they had been reassured after meeting the interviewer and felt comfortable speaking to him.

> *After the interview he said his only concern was that the interviewer this time was male. He said that he thought talking to another man about things might hinder how he talked and what he said and that he didn't want to feel compelled to be a certain kind of person and not be emotional. I read this as feeling compelled to perform a certain kind of masculinity. He said that in talking to me he did not feel like this, which I was glad to know and he certainly did not feel hindered to me during the interview. He was happy to talk about giving away 'macho' things with me as he did in previous interviews (MF Researcher fieldnotes).*

These experiences appear to support a wealth of literature which suggests it is easier for a female interviewer to gain men's trust and elicit discussion of intimate topics, as they are likely to be more comfortable revealing emotions and discussing feelings with a woman than they would be with another man where masculine heterosexual identity needs to be performed (Stein 1986; Allan 1989; Williams and Heikes 1993; Arendell 1997; Willott 1998; Pini 2005; Charmaz 2006; Manderson *et al*. 2006; Broom *et al.* 2009). However our data also suggest that despite preconceptions, speaking to a male interviewer is not necessarily experienced as inhibiting and can lead to opinions being framed in a different way. It is also unrealistic to suggest that participants respond uniformly to male or female interviewers because of their gender, instead the men in our study indicated that factors such as appearance and sexuality would mediate this, alongside other personal characteristics.

I anticipated that gender would be the biggest issue during interviews, yet in many situations I felt that age was more influential. At the time of interviews I was aged 23-25, the youngest of the three interviewers in this project and apparently younger than some of the participants had expected. Unlike the other researchers, I was rarely asked if I had children myself but more frequently asked whether I would like children in the future, which I felt was a reflection of my age. Several of the men made comments to the effect that I would understand when it was my turn to become a parent, assuming therefore that I would at some stage have children.

> *Yeah I think I've become closer because you can appreciate what they went through, you can appreciate your parents more when you have your own children, believe me, believe me Fiona you will appreciate them. When you see it yourself and you know what they've gone through (Alun, SW interview 2, FS).*

Throsby and Gill (2004) suggest that the sex of the interviewer is significant and that her status as a woman of child-bearing age may have an inhibiting or normative effect on what male participants say. Whilst I was not much younger than many participants and their partners, I suggest I was perceived as such and therefore rarely associated as someone likely to be a parent in the near future. During post-birth interviews I asked all men for an account of their experiences of childbirth. Before answering some men asked if I was ever planning to have children – again assuming that I did not already. I felt the safest response to this was "perhaps, but not anytime soon" thus remaining somewhat distant so they were able to be truthful about their experiences, as I felt their cautiousness was an attempt to protect me from the truth of difficult childbirths. I believed it was best to imply that I may have children in the future, as someone who was not interested in having children may have been perceived as an inappropriate person to discuss parenthood with. However this only happened in a small minority of cases and most men were happy to provide detailed accounts. I generally felt that my childless status acted to my advantage by positioning the men as knowledgeable subjects, meaning they may have been more confident in providing their accounts than they would have been if talking to someone with experience of parenthood. Paternalistic behaviour was most common among the older respondents, who may have felt this was the most legitimate way of interacting with a young woman (Easterday, *et al*., 1977; Herod, 1993). Alternatively the focus of the research topic may have emphasised this trait. When asked at the end of the interview to reflect on their experiences of participation, no-one said that the age of interviewer was important.

6.4 Continuity and change

After the third interview participants in South Wales were asked to reflect on their experiences, including how they felt about having the same or a different interviewer. Those who had had a continuous interviewer all said this had been important to them because of background knowledge.

> *Yeah it helps, you've got the story. Even if you've, I know you're reading the notes in front of you just to prompt you occasionally but you have got the story (Barry, SW interview 3, FS)*

> *It's nice really 'cause, especially 'cause you've been like from before she was born, it's nice to have that continuity… it's nice as well you can see how I am and you kind of know from my background, especially with my parents as well, that I do cry a lot – I haven't cried today – but I do cry a lot and I think you've got your head round that really. It's nice 'cause I feel comfortable telling you about my parents as opposed to somebody else come along I'd have to go through all that again, you know to skim the level with my parents, don't go in detail about it (Joe, SW interview 3, FS)*

Participants' most cited reason for continuity of the interviewer was that they would not have to repeat themselves, indeed possible repetition was the biggest concern for those who had spoken to different people. The background knowledge was also seen as important in later interviews for an understanding of which topics the participant felt comfortable talking about and how far they could be prompted around this.

In early East Anglia interviews participants appeared to develop good relationships with the first researcher and spent time preparing for her visits, clearly thinking about the research process outside of the interview situation.

> *I can remember thinking that there were lots of things that I wanted to tell you, Thinking oh yes you would be interested in that, I mean things like the antenatal care. Um things like the changes in him that I spot, those sort of things (Bruce, EA interview 3, JP).*

Whilst this may have been due to establishing a relationship with the researcher, it is also likely to be influenced by increased familiarity with the research process and having an idea about what to expect in the interview situation.

When conducting the fourth interviews with this sample group eight years later we asked participants how they felt about being interviewed by a different person, anticipating that the men might find it strange speaking to someone they had never met before but who was familiar with their previous responses from reading transcripts and listening to audio recordings. None of the participants said that they found this problematic, instead expressing their appreciation that we had 'done our research' and read up on their previous accounts (Farrall, 2006). When asked why they decided to participate again, participants reflected that they had enjoyed the previous interviews and were keen to maintain their relationship with the research project, continuing the altruistic sentiment that many gave as a reason for their initial participation. This commitment was seen to lie with the project in a more abstract sense rather than a relationship with a particular researcher.

> *Well it's interesting actually I er, first of all it is always valuable and important that I keep relationships with people, it's very very rare that I sever a relationship. I can hardly say we've built up a relationship (amusement) but maybe deep down there was something in me that thought something was set in motion that was actually valuable. ... I thought yeah this is valuable and important, and I'm hoping it can be of value and of worth to you as well (Adam, EA interview 4, FS).*

Similarly in South Wales, when those who had not had a continuous interviewer were asked, none found it problematic speaking to a different person. Concerns about repetition were often allayed early on when it was clear the second researcher had thoroughly read previous transcripts and fieldnotes and knew the necessary background information. It also appeared to be more important that the researcher was professional whilst providing an informal interview. Participants were asked 'how did you feel about speaking to somebody different?'

> *I don't think it's been an issue. As I say it's been done in a, in a very nice kind of um informal and conversational style so it's been nice. I can't say there's been any issue for me in that respect (Alun, SW interview 3, FS).*

> *Fine, you've both been great, you've both been professional, helpful, accommodating with times and that kind of thing, really nice people to sit and talk to for a couple of hours (William, SW interview 3, FS).*

> *No, no difference really to be honest. Um not really. I mean not that I can think of, it was a long time ago. It's fine, you were both very professional so no problem (Neil, SW interview 3, FS).*

These responses are likely to be influenced by the fact that participants were speaking to one of the researchers and they may have answered differently if unidentifiable by the research team. However those who had concerns about interviewers on other occasions (such as speaking to a male interviewer, discussed above) had felt able to discuss this with the researchers.

The project design meant interviews were six to nine months apart, with minimal contact in between. As many of our participants emphasised how busy they were, some giving strict time limits for interviews, we felt this strategy of low involvement with participants between interviews was most appropriate for our sample. This relatively infrequent contact was cited by some men as a reason why they did not mind speaking to a different person, although they suggested that if contact was much more frequent (such as weekly or fortnightly) then continuity would be of greater importance. However although our participants did not appear to find researcher continuity particularly important, it may be that different groups who are more vulnerable or less confident about participating in a research project would find more benefits from continuity. With very few exceptions there was a great degree of similarity in participants' accounts between interviewers in terms of how they spoke and what they were prepared to disclose or discuss. For example, those who discussed their sexual relationships generally did so in all rounds of data collection with all researchers.

Mutual disclosure is a practice which has been encouraged by feminist researchers to create an open encounter which allows an exchange amongst equals (Oakley, 1981; Lentin, 2000). It has been suggested that such methodologies which privilege the values of participation, reciprocity and reflexivity could usefully appropriate these to explore male subjectivities (Ryan, 2006). However in our own research, participants did not appear to expect or want mutual disclosure, instead reiterating the importance of the interview as an opportunity to discuss their own experiences, as new father's voices were rarely heard. Therefore we did not find this a useful strategy for establishing rapport. It may be the case that where mutual disclosure does occur, leading to a greater involvement of the interviewer's self (Johnson, 2002) researcher continuity would be viewed as more important.

6.5 Perspective of the researcher

Whilst our participants apparent 'researcher ambivalence' is somewhat disappointing on a personal level, it was clearly advantageous for our study where it was not possible to provide researcher continuity. Whilst we immerse ourselves in participants' data and consider ourselves to have some level of familiarity with them, interviewees must give much less thought to their participation and us as researchers, and are unlikely to place such a high value on the research relationship. Therefore it would be presumptuous to assume that the researcher has a powerful affect on participants' lives (Luff, 1999). Although some participants may be unconcerned about researcher continuity, I would suggest that it is hugely beneficial for the researcher.

Prior to an initial interview with a new participant there were always inevitable nerves about what they would be like and how the interviews would go. First interviews were also a time of laying the groundwork to ensure a good relationship with the participant, as well as getting to know what aspects they seemed to enjoy or dislike. By the second interview I had a better understanding of participants and a good idea of which ones were happier to consider more difficult or personal questions. With the South Wales sample I had a direct comparison of those I had interviewed across all waves and those I had taken on at a later stage. Overwhelmingly I found the second interviews with men I had not previously interviewed more difficult. I had been able to read up on their previous interviews, listen to voice recordings, had spoken to them all on the telephone to arrange the interviews, and had read the other researcher's fieldnotes about the interview experience so had a sense of each person before we met. However, I had not had chance to engage in conversation with them before and after the interviews to establish a rapport and they had little impression of me. I also had a sense of each person based on their reaction to the other interviewer and felt conscious that if they reacted quite differently it would be down to me. Extracts from my fieldnotes below illustrate the initial differences in conducting second interviews with participants I had already met and those who had been interviewed by another researcher.

> *I found it difficult to chat to him initially, more so than I anticipated given the impression I had formed of him, and this made me reflect on the difference between revisiting my own interviewees and meeting MF's for the first time.*

> *I had been looking forward to this interview after enjoying the previous one so none of the usual nerves. Arrived in plenty of time as directions quite easy for this one, I was about 20 minutes early so sat outside in the car and read for a bit. Participant must have seen me from upstairs window as he came out and said to come in, told me off for waiting outside. Was very friendly and chatty from the start, feel very comfortable with him.*

In general as the second interviews progressed participants appeared comfortable, although I felt with some of the quieter participants that the second interview was still a period of getting to know one another, which left me postponing more challenging questions until the next round. By the third round of interviews I felt there was little difference between those I had interviewed all the way through and those I had not.

6.6 Concluding thoughts

The value of researcher continuity in QLL, which has been emphasised elsewhere, has a more complex dynamic in our own research. It was impossible for us to ensure continuity for the East Anglia participants and we anticipated that the men may be reluctant to speak to a new interviewer; however they were happy to participate, indicating that they felt a commitment and relationship to the research project rather than an individual researcher. Similarly, South Wales participants expressed no concerns about speaking to someone different as long as the researcher was familiar with their earlier accounts and continued to make the interviews an informal and relaxed encounter. Although continuity appears preferable for both participant and researcher, it is reassuring that when unable to provide this, participants did not appear to find speaking to a different interviewer problematic. However this may be a particularity of our sample and more vulnerable groups, or participants in a study with more frequent contact, may place a higher value on continuity.

From a researcher's perspective it is preferable to maintain consistency as it was easier to return to familiar surroundings with a better idea of what to expect and the approach to interviewing favoured by the participant. For example did they enjoy challenging questions or find them intimidating? Did they talk at length or require more prompting? Returning to those I had met before I felt more relaxed and confident during the interview and it was generally a more enjoyable experience. The benefit of being a subsequent researcher in a longitudinal study is that there was a relatively large amount of data I could familiarise myself with before meeting the existing participant. Fieldnotes from previous researchers also gave me an impression of participants and indications about what to expect.

The three researchers in this project differed in many aspects, some of which I have reflected upon here. Whilst gender was a significant factor, other personal characteristics, particularly age, had an impact upon participants' reactions. However I would argue that for the most part these differences did not mean participants altered what was said but the way in which it was framed. Largely participants who discussed particularly personal matters with one interviewer were equally likely to do it with the next, whilst those who clearly sought to keep some things private did so across all interviewers. Speaking to a female researcher was perceived by some to be less threatening to masculinity, enabling the men to be more emotionally expressive. Yet our experiences suggest encounters with a male interviewer were not as problematic as participants had anticipated they might be. It is too simplistic to suggest that participants respond in particular ways to male and female researchers as participants have suggested that this is mediated by other personal characteristics such as age, appearance and sexuality.

Given the differences between the researchers and our varying interests, our interviewing approaches, and often interpretations, were quite distinct. Having multiple researchers helped us to avoid the problem of one approach being compounded, which can make it difficult to distinguish between findings and researcher style (Thomson and Holland, 2003). Instead we could see commonalities and discontinuities across interviews, which indicated participants' preference for certain styles of questions or approaches, consequently informing the structure of subsequent interviews. Having different researchers could also provide benefits by avoiding accumulation of a partial perspective (Holland *et al*., 2006). Difficult early relationships between a researcher and participant due to reactions to personal characteristics or interviewing style could also be avoided in later interviews by introducing a different interviewer who may find it easier to establish rapport. Therefore whilst continuity continues to be preferable, lack of continuity is not necessarily problematic and can offer new ways of approaching the data.

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7. Balancing on the Edge of the Archive: The Researcher's Role in Collecting and Preparing Data for Deposit

Lucy Hadfield

7.1 Introduction

Archiving is an increasingly integral part of a qualitative research agenda, with several funding bodies (including the Economic and Social Research Council) requesting that researchers make data available for archiving. This requirement has been justified by allowing for greater transparency and aligning qualitative research to a more rigorous scientific approach enabling the testing and checking of results and interpretations by other researchers. Depositing data in a digital archive can also be seen as generating a wealth of opportunity for secondary research, particularly in an historic or geographical context, allowing for comparisons across data sets or time/space continuums (Timescapes, 2007-2012). Despite this, there is a sense that the important work involved in preparing data for archiving by researchers is rendered relatively invisible, with the deposit of data within national archives not being given some form of equitable recognition as other research outputs such as publications (Bishop, 2008). In addition, deposits are made amid relative scepticism from some corners of the academic qualitative research community in relation to the particular context of qualitative research. Ethical questions, such as whether archives satisfy the privacy of the researched and researchers, and epistemological questions as to whether anonymised qualitative research can be adequately revisited (via the archive) in relation to the loss of context (Hammersley, 1997; 2004, Mauthner *et al.*, 1998; Parry and Mauthner, 2004) pose significant dilemmas for the researcher.

The Timescapes Programme is unique in that it aims not only to generate primary research, but also to preserve data and to enable secondary reuse - establishing a working archive of data for sharing and reuse among authorised users. In doing so, Timescapes makes visible the central role of researchers across all phases of data preservation and sharing (Bishop, 2007). This paper focuses on this researcher role in relation to the unique simultaneous process of collecting and preparing data for the archive, using examples from *Timescapes Project 3 – The Dynamics of Motherhood: An Intergenerational Project*[16]. As such, it offers new insights into the practical, ethical and substantive questions researchers face and must continually address when preparing data alongside the collection of new data. I will explore the ongoing process of acquiring participant consent, anonymising interview transcripts, and provision of contextual data. In doing so, I seek to illustrate the delicate balancing act researchers must maintain (and revisit) in relation to the rights, privacy and anonymity of the participant, the integrity of the research project, the needs of the secondary user, the privacy and reputation of the researcher and the significant amount of time and resources needed to address and engage with these issues. These factors are intensified and illuminated by the simultaneous process of collecting and preparing

[16] The team comprises Lucy Hadfield, Mary Jane Kehily, Rachel Thomson and Sue Sharpe and is based at The Open University.

data, unique to the Timescapes experience. This paper is written from a unique perspective as part of both a project and programme that recognises the value and importance of allocating time to the preparation of data for archive and space for the communication and discussion around issues of good practice. I will conclude by considering the lessons learned from our experience in the light of calls for the academic community and funding bodies to raise the profile and status of archive deposits (Bishop, 2008) and the work of researchers in preparing datasets.

7.2 Background: The project and programme

Our longitudinal study began in 2005, capturing the transition to first-time motherhood for a diverse group of UK women, aged 15 to 48 (Thomson and Kehily, 2008; 2009). The first stage of the study (The Making of Modern Motherhoods project - MoMM) began with one-to-one qualitative interviews with 62 women, in the late stages of pregnancy. Twelve of these women were chosen as family case histories, which involved conducting additional interviews with grandmothers and significant others, and a subsequent interview approximately one year after birth. The MoMM project, as part of the ESRC Identities and Social Action Programme, was obliged to offer data to the UK Data Archive at the University of Essex as a condition of funding. A subsequent stage of the study - the Dynamics of Motherhood (DoM), as part of the Timescapes Programme - followed six of these case studies, conducting an observational 'day-in-the-life' with mother and child during 2008 and 2009 as well as repeat interviews with grandmothers, significant others and mothers. As part of the Timescapes programme, we followed the condition that both sets of data (Stages 1 and 2) would be deposited within the Timescapes archive (www.timescapes.leeds.ac.uk/the-archive/).

The preparation for deposit of data in the archive for the DoM project should be considered as a process rather than an 'add-on task' at the end of the project (Clarke, 2006; Bishop, 2008). The longitudinal nature of the DoM project enabled us to revisit data collection and preparation at various stages. From the outset we were in continual conversation with participants, research team members, archivists and the wider research programme (including other researchers). We gained insights from the *Inventing Adulthoods* project (now *Making the Long View,* MLV hereafter[17]) both in the design of the project and in the process of collecting and analysing data, building on the experiences of Rachel Thomson and Sue Sharpe, who are researchers on both the DoM and MLV projects. We also sought insights from Chief Archivist Libby Bishop and the archive team and other researchers while collecting and preparing data (See Bishop, 2007 for further discussion).

Our project is founded on the principles of collective working, and this extended to data collection and preparation for archiving and publication. It reflects the space we felt was needed to address the complex ethical issues that arise from archiving and also contributes to a high-quality data set. Working in this way also has a significant impact on research relationships, with researchers taking individual responsibility for confidentiality and anonymity informed by their specific subjective knowledge or insight of both participant and participant situation (i.e. a more immediate sense or

[17] See also www.lsbu.ac.uk/inventingadulthoods

grasp of what may be sensitive or identifying to that participant via the research relationship beyond what is revealed via the transcript or fieldnotes).

7.3 Accountability to the participant

In preparing data for submission to an archive researchers must identify and overcome legal and ethical issues which may prevent deposit. Researchers are obliged to: protect participants; gain consent and maintain confidentiality; ensure data is stored securely and is clearly anonymised; protect the physical, social and emotional wellbeing of the participant; and ensure participant's rights are protected. Therefore, our principal concern throughout the research, and in preparation for depositing data in the archive, was to protect our research participants, as far as we possibly could. We were concerned that the participants in our study were able to make informed decisions about their participation and the assignment of copyright for both archiving and publishing purposes.

7.4 Informed consent

The notion of informed consent is complex and subject to much debate. Researchers are required by a number of ethical bodies including their own institution, other professional boards such as the National Health Service (NHS) and organisations such as the British Sociological Association, to give participants sufficient information to make informed decisions about participation. Questions arise in relation to the capacity to give full information, for example, whether researchers and/or participants can ever fully know what the research is about until it is conducted and the impossibility of knowing all the consequences of participation (Wiles *et al.*, 2004). This has implications for the emotional wellbeing of the participant. Interview questions, for example, may lead interviewees to reflect on potentially painful events or experiences that they may not have discussed with others and which they may not have anticipated. Participants may become concerned that what they say may not remain confidential from, in our case, the NHS service provider through which we gained access, or from other family members, particularly if they are involved in the same study. Qualitative longitudinal data also generates the kind of insights that participants themselves may not be fully aware of, for example, contradictions and silences between and within different accounts over time, which may expose aspects of their experience that are not explicitly voiced. This becomes particularly pertinent in relation to publication and archiving.

Publication and archiving create their own distinct issues in relation to informed consent. Legally, under the Copyright and Patents Act (1988), the participant's words remain their intellectual property. While the researcher and institution hold copyright of the recording made of the participant's voice, once it is transcribed it becomes the property of the participant. As a result, in order for participant's words to be used in publications, they must sign over copyright (ownership) of their words to the researcher. The 'author' (participant and researcher) also has the right for their material not to be subject to 'derogatory treatment' (Williams *et al.*, 2008:3). There are cases in which participants wish to be identifiable and named within social research. However, particularly in relation to research on personal and sensitive issues participants tend to entrust researchers to fulfil the obligation that they will not reveal their identity to others. This involves a process of anonymising data, as I will later discuss, with the removal of names and places, a process that is standard across much qualitative research practice. There is also a certain level of trust about the way in which their words will be constructed in publications, guided by the information given by the researcher on the project focus and aims. Responsibility for publication can involve a number of strategies for anonymisation in order to protect the identity of participants. Researchers have control over which segments of their data they use in publication; control of which is significantly absent in the preparation of data for secondary use.

Informed consent and the archive

The Timescapes data will be held first at the Leeds University Digital Objects repository (LUDOS), where it will be processed and enhanced[18]. At regular intervals, the data will be sent to the UK Data Archive for long-term preservation. Licences and access controls will exist in both locations to ensure only authorised and registered users can see or download the data. The potential for identification and the use of the data becomes more of a concern in relation to archiving; questions relate to who will access the data and the means by which they will disseminate it. This can generate considerable anxiety for the researcher in relation to their lack of control over how the data gets used and their responsibility to the participant. Some have even gone as far as to argue (in the case of street gangs and crime) that there is potential that individuals, from whom participants wish to conceal their narratives, may come into contact with archives by becoming students or working within the academy (Aldridge *et al*., 2009).

There are a number of strategies for minimising potential harm to participants in relation to secondary use. Strategies include a period of closure or embargo, allowing time to pass and, in the process, sensitivities to diminish. Levels of access can be created: restricted to those given permission by the researchers or by the archive itself (Corti, 1999: 21). In reality, however, the future use of data is relatively unknown. Even when access is limited, researchers face dilemmas surrounding issues of secondary publication. Whereas, for example, the primary researcher may take care not to place large segments of data together from the same case study to avoid participant identification, a secondary user may not. While Corti (1999) has argued users could undertake not to breach confidentiality by providing identifying details in their published work, their interpretation and understanding of this may differ from the primary researcher.

How we gained informed consent

Consent forms have been seen as a useful way of gaining consent from participants, as a means of increasing understanding of the project aims (when administered in conjunction with information on the project) and assurance of confidentiality and participant rights. In the initial study we designed information sheets and consent forms for our participants outlining our principles of confidentiality, anonymity in relation to publication, data storage, and plans for archiving at the end of the project, including information about the UK Data Archive. Under guidance from NHS ethics committees, participants should be sent information 24 hours in advance to enable

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[18] For more information see www.ludos.leeds.ac.uk/

considered consent. The need, however, for informed consent to be considered as a process, rather than a single event, has been highlighted (Miller and Bell, 2002; Renold *et al.,* 2008). Respondents were asked to give consent in two parts. First, to take part in the interview; then, once the interview was complete, they gave consent for the transfer of copyright. We did this to account for the fact that participants would not know the information they would give until after the interview had ended. Participants were also asked if they would like to stop the interview at any point, particularly when they appeared tired or emotional.

Participants were asked to confirm they understood their words may be used in publications and archived under strict conditions. They were given the option of the storage and use of their data with or without strict preservation of anonymity. This was explained to participants not to mean the preservation of identifying factors such as names or addresses but in cases where we may wish to deposit audio data (in which they may be identified by the sound of their voice).The image of the archive however is in a sense a difficult one to grasp, especially as we cannot be certain who will use the data in the future or the nature or purpose the project - even when access is restricted to academic research. The subsequent Timescapes information sheet allocated substantial space to set out a clear description of the archive in lay terms highlighting:

a) Its digital nature ('available electronically over the internet ... although putting the data in an archive is NOT the same as making it available on the web');

b) Potential future users ('researchers, policy-makers and others….but, in truth, we really cannot predict how all the data will be used!');

c) Information about the protection of participants ('owning copyright is the only effective way we can protect your confidentiality');

d) Information about the preservation and security of the data, including information about licences and levels of access, and;

e) Information about anonymisation, including examples of how data will be anonymised.

Participants were asked to consider participation in the project and subsequent archive in relation to assurance of the 'safety' of their data and the potential benefits of their data for other researchers.

Going beyond consent forms: The subjective side of consent

While all Timescapes researchers had the benefit of these clear guidelines and consent forms, and most projects subsequently adapted the guidelines for their own project, the role of the researcher is to ensure that informed consent is communicated, understood and negotiated as part of an ongoing process before, during and after the interview. This is a process that becomes more complex in longitudinal research. There is a danger that participants might feel obliged or complacent in relation to the trust and rapport already established with the researcher/project. This may well be the case particularly in longitudinal research where they may feel more familiar with the purpose of the project. There may also be a certain amount of pleasure and prestige about the idea of being researched, written about and your story being archived for the future (see also Weller, this volume). As great-grandmother Rosie Wagland revealed, when I asked her to reflect on how she felt about the interview transcript going into the archive:

> *'Well I've been quite flattered, I mean allowed to ...you know be included in it really. ... A lot of human beings' stories are very interesting, far more than mine.*

Thus, in the process of re-negotiating informed consent, researchers need to be aware of such issues. Yet the researcher is also not exempt from the danger of glossing over the limits of confidentiality and anonymity for the participant. It has been argued that researchers may give a cursory explanation for fear of losing participants (Wiles *et al.,* 2004).

Whereas informed consent for participation, publication and archiving was relatively straightforward for the 62 first-time mothers in the first stage of the study, it became more complex in relation to the 12 family case-studies, six of which we continued to research as part of our Timescapes work. Our concern was that members of the case-study may seek out what other kin had said. Initially we found explicit discussions with case-study participants about confidentiality and our own boundaries about revealing what was said throughout the course of the longitudinal project invaluable. We made the suggestion that, while we were unable to disclose, for example, what a woman's mother felt about her childcare arrangements, it was fine for the issues to be discussed between themselves. We found that conversations concerning confidentiality enabled further discussion about publication and archiving.

Examples of participant consent

For one woman, the issue of non-disclosure and complete confidentiality was paramount, particularly in relation to her discussion of her own mother's mothering. She linked this to her desire for strict preservation of anonymity (the process of withholding or concealing the identity of a research participant) in publication and data-archiving. One way of negotiating consent to publish and archive data in relation to confidentiality and anonymity therefore is to think about those from whom participants would want to keep accounts private. By taking into account the context of the interview data researchers can begin to develop strategies appropriate for each participant. This can help the researcher gauge appropriate levels of anonymisation for archiving and the removal of sensitive data. In addition, we were concerned that once case-study material was placed together (i.e. in a chapter or in the archive) that the means for identification would become more apparent, especially if read by those known to the case-study participants. We decided that it would be appropriate to discuss our concerns with participants, asking them to consider talking to all members of their case-study about feelings towards being identified within an account, along with strategies to deal with this.

Generally, we found many families were relatively relaxed about our boundaries around disclosure/confidentiality and felt participation in the project appeared to invite more open discussions within the family. In relation to publications, one mother felt she may save reading the book for the future, to share with her son when he is older. Other families advocated a strategy of collectively avoiding access to any publication (in the present or future) or discussing potential negative segments of data that may upset other members. As an example, here is a segment from my fieldnotes of a second interview with Rosie Wagland's daughter, Patricia:

> *She told me that the interviews had led herself and her daughter to talk about things and she was surprised at the things that (her daughter) had said about mothering. She said there are no secrets in their family, they are an open family and if anything negative was said they would discuss it together (I think about the things she said about her mother in her previous interview when she says this) but if she was honest she would not be interested to read the book in any case. She told me that she thinks it is important we keep on reminding people of the issues of confidentiality and anonymity and that if she had a problem with it she would absolutely pull out even if it meant inconvenience to me. I feel my face burn at this point. I feel a little told off (!) and horrified at the idea of having to recruit another family.*

When I shared my fieldnotes with the team, there was an agreement that a sense of tension was evoked in this interaction. In thinking about our limits to confidentiality and anonymity two issues arise. Firstly, in relation to internal confidentiality within the family case-study there is a sense that Patricia goes on the defensive, perhaps remembering things that she has said in the past, or anticipating what has been said by others and reassuring herself that this would be worked out as a family. Secondly we also learn of my own emotions in relation to losing the case-study in the future and the implications for material already archived. Here ethical duties towards the participant are merged with my duty as a researcher to the quality of the research, including the maintenance of the sample. Patricia is right to highlight the importance of renegotiating consent and returning to issues of confidentiality and anonymity. But there is no doubt this raises complex ethical issues for the researcher. Ultimately, I would agree with Clarke (2006) and others (Corti, 1999; Singleton and Strait 1999) that complete anonymity can never be fully guaranteed. As a result, researcher and participant must undertake considerable work in negotiating what is acceptable. In doing so, researchers also need be fully aware of other pressures or ethical duties which may cloud their desire to negotiate consent.

7.5 Introducing anonymisation

Clearly, anonymisation is an essential form of protecting participants. From the outset, we collected our research data with issues of archiving and preservation of anonymity in mind. For example, in both the MoMM and DoM projects, we used photographs to document aspects of motherhood. In doing so, however, we were careful not to expose the identities of those taking part, taking pictures of objects as opposed to people or identifiable aspects of space. We also wrote fieldnotes (for sharing among the research team) in such a way that identifying material such as addresses, names, and sensitive information was concealed without losing significant meaning. We built on previous experience from the *Inventing Adulthoods* project in which the team realised that despite the rich data generated they were unable to find ways of using and 'showing' all the material while maintaining confidentiality.

One solution, to the issues the encounter with Patricia raised, is to see the benefits of anonymisation as an ongoing process, ideally in consultation with participants.

Renold *et al.* (2008), for example, watched video material with participants to negotiate anonymity and consent to use particular segments of data. In our fourth-wave interview with our mothers, we have constructed interview schedules using their words from previous interviews. Revisiting data in this way can be seen as a form of feeding back interpretations and gives participants some insight into the way their data is organised and condensed. This process is a way of showing mothers what we identify as significant within their narrative, including aspects of data that become more apparent in longitudinal research, such as contradictions and silences. In doing so, we offer the participant space to talk back to this version of themselves and, if necessary, highlight sensitive aspects of the data that may need particular preservation of anonymity.

The process of anonymisation

We began the process of transcript anonymisation by giving all participants an ID number. This was coded so that, at a glance, the research team would be able to decipher the stage of interview, the location the participant was recruited from, the researcher who conducted the interview, and the date of the interview. We used these ID numbers in analysis and group discussion. Informed by lessons learned from the *Inventing Adulthoods* project, the process of assigning pseudonyms was left to later stages of the research to avoid confusion, repetition of actual participant names as pseudonyms for other participants, and the slippage of actual names in publication or public presentation. The attribution of pseudonyms was made by each researcher for her own participants, since it was felt some names would perhaps not suit certain individuals. During the first stage of the project, an Excel workbook was created with a spreadsheet of identifying details for each participant. In the second stage (DoM) the project benefited from the employment of our project secretary Katy Gagg who implemented our anonymisation process, working closely with individual researchers. Whilst Katy was an invaluable source of support there were financial limits on our resources.

7.6 Responsibility to the secondary user and integrity of data

While responsibility to our participants was our key concern, Qualidata[19] recommends that documentation is as comprehensive as possible in order to allow secondary analysts to make informed use of the materials. These concerns also reflect our wish to maintain the integrity of our data. One of the pitfalls of involving all the researchers in the process of 'light' anonymisation (i.e. the replacement of names, places and other identifying detail with a code/description) is that we found differing interpretations about the way in which data ought to be anonymised. We also wanted to ensure consistency within: the data set; individual transcripts; and across sets of transcripts (i.e. case-studies). In addition we wanted to avoid losing detail through strong or 'blanket anonymisation'[20], particularly in the case of cross-cutting

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[19] ESDS Qualidata is a specialist service of the ESDS led by the UK Data Archive (UKDA) at the University of Essex. The service provides access and support for a range of social science qualitative datasets. See for further info: http://www.esds.ac.uk/qualidata/about/introduction.asp

[20] Process where all names and identifying details are removed from a document usually replaced with standard description or symbol.

relationships (for example, reference to the same aunt or family friend by different members of the same family may be lost if referred to as *Friend 2).

When considering the secondary user, we also found ourselves asking questions about what they would be interested in exploring within the data and what would be lost via anonymisation. In particular, we realised blanket anonymisation would mean geographical comparisons would be lost. We had to balance our desire to give enough detail to allow for these comparisons against the protection of the participant and our limits on time and resources. We decided to maintain our previous method of numbering places, names etc. as they occur within a single transcript rather than across transcripts or case-studies for consistency and due to time constraints. Other significant detail, such as comparisons of health care in different areas, would also be lost as we were concerned that the process of giving one place name (e.g., Manygates Hospital) the same code across all transcripts within the data set (Hospital 1) would be too time-consuming. We also decided that the use of pseudonyms (other than the participant) would also be time-consuming, particularly in relation to our practice of revisiting participants (tracing back previous name changes) and ensuring that pseudonyms are not repeated and that we did not use any original names. All interviewees are referred to as *interviewee and their pseudonyms have not been used (other than in the document label). All other names were listed in order of appearance within individual transcript. By doing this, significant context can be lost; names can often signify class, ethnicity, and religion. For example, some parents follow family traditions naming children after an ancestor, whilst for others the name a child is given reflects particular ambitions or religious meaning. Where possible we decided to retain the detail about occupation and profession within women's accounts. We did this because we felt that such material was often crucial to the narrative of motherhood. Changes have, however, been made where we felt the information given was too revealing.

While this approach appeared to satisfy a level of consistency and addressed the protection of the participant, we were aware that a significant level of context was lost in the process of anonymisation. In some cases, the amount of geographical detail was so rich in women's accounts (such as moving from country to country, or in the case of work-placements) that the transcripts were in danger of being rendered incomprehensible. In addition, as Clarke (2006:14) argues:

> S*pace is much more than about mere background... understanding the production of power of space requires an appreciation of the nuances of how different social relationships are constituted in time and space 'the capacity to understand the illuminary capacity of this space may disappear into a factitive or imaginary context.*

Consequently, we decided to include a note on anonymisation in the first paragraph of relevant transcripts. Notes have been made where the anonymiser feels the consistent nature of the anonymisation has lead to a loss of context. It alerts the reader, for example, to:

a) Significant information of the geographical area which may have been lost in the anonymisation process;

b) Information about the geographical context of an interviewee's biography (for example, migration due to political unrest);

c) Relationships that may be discussed across transcripts (for example, a childminder referred to by both mother and daughter).

It was agreed that Katy Gagg would work with the researcher to finalise the detail in the note. The scope for these notes was limited by the timescales and resources available. What was crucial was that we left a 'paper trail' (Mason, 2004; Clarke, 2006) of the process, not only for our own use but as a reference for the archive team, potential future users (depending on access levels) and also other Timescapes projects.

7.7 Rich contextual data: the research dynamic

Another important aspect of the context of research data is the encounter between interviewer and interviewee. In both stages of the project, our process of recording fieldnotes was guided by ethnographic note-taking and the use of case profiles in longitudinal research (Thomson and Holland, 2003; Thomson, 2007). We recorded rich descriptions of the process of setting up the research encounter, the research setting, as well as, an account of the interviewee. In particular, we were concerned about capturing the emotional dynamic that occurs in the interview and using the subjective feelings of the researcher as data in its own right (Lucey *et al.,* 2003). We recalled our feelings during and after the interview, our hopes and fears for the participant, and reflected on whether our own positioning in relation to motherhood (as mother, non-mother, daughter, friend) came into play in the encounter (Thomson *et al.,* 2007). During the second stage of the project, we began to explore issues of researcher hindsight, foresight and insight, and how they interact in the research process. In Stage 1, these fieldnotes were not written for public use; they were raw and uncensored, leaving the interviewer relatively exposed and vulnerable to personal critique. We shared and interrogated them as important sources of data at research team meetings and group analysis events alongside transcripts and visual data revealing significant insights into the research (see Thomson, 2009 forthcoming for overview). In this sense, unlike the interview transcript, fieldnotes were viewed as work or data in progress/process. The rich contextual data of fieldnotes, however, felt too revealing and challenging of professional and personal identities to deposit within the archive. Equally, if we had decided from the outset that our fieldnotes would be deposited, it is likely we would have censored more difficult feelings. This process of evaluation was again informed by previous lessons from the *Inventing Adulthoods* Project.

Early reflection about the nature of qualitative research and its suitability for secondary analysis focused on the subjectivity of the primary researcher and the fact that research is constructed as a product of interaction between researcher and respondents in a particular time or context (Hammersley, 1997; Mauther *et al.*, 1998). Hammersley (1997:138-9) argued that, due to the specific nature of qualitative research, as relatively 'informal and intuitive', and the ideas and experience of the researcher or 'cultural habitus', it is impossible for another researcher to inhabit or know the research. Research, according to Hammersley, could not be matched or compared with later studies as though they hold a 'common currency', since they are based on a particular set of cultural and theoretical conditions. Both Hammersley (1997) and Mauthner *et al.* (1998) pointed to gaps in primary qualitative data that would hinder secondary analysis. Revisiting their early data, Mauthner *et al.* highlight questions they failed to ask and would have asked at a later date. Not all qualitative researchers would agree that such research is both informal and intuitive (indeed some may argue that rigour and systematic analysis are as important as for quantitative work). However Hammersley and Mauthner *et al.* are right in arguing that qualitative research does produce data that is unique to the specific research relationship, time and context. Indeed, an interrogation of these factors through the subjectivity of the researcher over time can enrich our understanding of the data and subject matter. What is neglected in their arguments is the value of taking a historical lens on social science data (Moore, 2006; Bornat, 2008). The whole premise of our own research is to explore change over time (including the gaps and inconsistencies in past interviews), demonstrating how hindsight, foresight and researcher subjectivity in the longitudinal project can reveal new insights into the data. The secondary analyst, of course, can never hold the same subjective knowledge as the primary researcher. But they approach the research from a different historical/cultural and subjective viewpoint, with different versions of historical hindsight.

Henderson *et al.* (2006) argue that longitudinal qualitative data in itself provides a challenge to the perspective that primary research is 'beyond the reach' of other researchers because, by its very essence, the research must be continually revisited and re-contextualised. Henderson *et al.* include within this process not only the participants, data and researchers, but also the theoretical and methodological approaches and the genre of the time of analysis and writing. As a result they argue the '*cultural habitus'* of both the researcher and researched shifts at each stage of data collection and analysis producing 'an exponential reflexivity on the part of both – a reflexivity that recognizes change and avoids fixing any actors in, and aspects of, the research process in the past'. Henderson *et al.* call for constant recontextualisation of biographical data and the need to acknowledge interpretation as integral, and making this explicit.

Positioning our reluctance to deposit fieldnotes in the archive in the context of this debate is difficult. It comes down to a need to balance the presumed potential desires of the secondary analyst with a respect for the privacy of the researcher. Contextualising data on the aims, objectives and biographical position of the researcher and further information on the fieldwork dynamic would be invaluable. But it could also pose significant challenges to the researcher's personal and professional standing. Yet even if fieldnotes were not archived, researchers can still be subject to analysis within the interview dynamic via interview transcripts[21]. The realisation of this possibility caused anxiety for some members of the Timescapes Researchers' Forum in a recent residential workshop discussion. One option is for researcher accounts of the research process and fieldwork dynamics to be formally recorded, in publications alongside research, putting an element of control back into the researcher's hands. This is something that our team has pursued throughout the project and has been found to be a successful solution in other projects, where issues

[21] See http://www1.lsbu.ac.uk/inventingadulthoods/dataset/experiences.shtml for reflections on a psycho-social approach to secondary analysis of the *Inventing Adulthoods* Project

such as different religious and political positions between researcher and researched have been highlighted (Bornat, 2008)[22]. Alternatively, researchers can look for new ways of incorporating their subjectivity within the research process. In our 'day-in-the-life' fieldnotes, for example, we wrote our observations with the view that they would be archived, without losing our own subjectivity within the data (Thomson *et al.,* forthcoming). Our experience thus shows that there are significant choices to be made by researchers about the amount of researcher disclosure that can be made available in the archive.

7.8 Conclusion

Archiving is increasingly becoming an integral concern within the qualitative research agenda and as such an emerging debate about the value of archiving has resurfaced. In an attempt to move away from the polarised debate, those such as Mauthner and Parry (2006) have attempted to bridge the gap between their previous arguments, suggesting that there are both advantages and disadvantages to archiving and some, but not all datasets, may be usefully archived.

This paper has outlined some of the key dilemmas and decisions made in one research project in the process of preparing to deposit data within the Timescapes Archive. I have discussed the challenges that affect researchers in the process of preparing and collecting data for archiving. This process is time-consuming and can easily be underestimated in the planning of a research project (Aldridge *et al.,* 2009). Researchers preparing for archiving have to balance their responsibilities to participants with the needs of the secondary user and the integrity of the data. It is not just participants that face the risk of exposure; researchers cannot be given the same guarantee of anonymity and, as a result, their work and personhood is left open to criticism; a significant concern for some early-career and/or contract researchers. Yet under the current regime of research assessment with its emphasis on published research outputs, you could be forgiven for believing that - despite the increasing emphasis on archiving from funding bodies - anonymisation is relegated to low-skilled relatively invisible administrative work. Our current practice is work-in-progress, but we are constantly learning from the experiences of others and sharing our own dilemmas and decisions both with researchers and archivists. Timescapes is a unique project in that is has allowed significant space to recognise the role of the researcher in this process reinforcing the skilled practice of collecting and preparing data for archiving.

With thanks to: Rachel Thomson, Sue Sharpe, Sheila Henderson, and Libby Bishop for their considered feedback and suggestions on this paper and special thanks to Katy Gagg for all her hard work and commitment in assisting the preparation of our data for the Timescapes archive.

[22] See also http://www1.lsbu.ac.uk/inventingadulthoods/capturing/research_time/methodology/methodology_3.shtml).

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January 2010
Published by University of Leeds

ISSN: 1758-3349 (Online) (Print)

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