Qualitative Longitudinal Research: A Discussion Paper

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1.   INTRODUCTION

This discussion paper is based on work conducted for the ESRC in relation to their consideration of qualitative resources in UK social science in 2004.   The ESRC were concerned to know whether a large-scale qualitative longitudinal study was feasible or desirable. In pursuing this feasibility study we

- mapped the personnel, groups and resources associated with qualitative longitudinal research (QLLR) whilst also paying attention to major quantitative longitudinal research, in which the UK has a high reputation;
- undertook a literature review of QLLR in a range of social science disciplines;
- undertook an extensive consultation with the social science community and relevant others about the issues associated with and possibilities for QLLR. We employed a number of methods including email questionnaires, face-to-face and telephone interviews, and group consultation discussions.

Here we present the fruits of the study, incorporating the literature review, the discussion paper produced for the ESRC, and an extensive bibliography. The bibliography ranges more broadly in the field of qualitative longitudinal work as well as including material referred to specifically here. References have been updated where possible, and a short postscript is included at the end.

1.1   Why qualitative longitudinal research now?

There is a growing interest and involvement in qualitative research methods in the social sciences, and amongst policy makers, who can see that statistical methods can give them answers to 'what' questions, but leave them in relative darkness about 'why' and 'how'. A paradox emerges between the increased interest in qualitative methods and a desire to apply the findings of such research to policy; and the growing dependence in western societies on quantitative research and statistical knowledge upon which to base economic and socio-political planning, administrative practices, policy evaluation and governance generally.

In the social science field it is the limitations of quantitative methods, and a general and ongoing critique of positivism that has led to a turn to the exploration and more extensive use of qualitative approaches. Qualitative research is particularly appropriate for examining process through its attention to context and particularities. Qualitative longitudinal research is predicated on the investigation and interpretation of change over time and process in social contexts.

In this situation, the ESRC itself has become increasingly interested in investigating both the existing qualitative research resources available in the UK social science community, and the possibilities for further development and capacity building in this area. There has also been a concern that for a range of reasons, the balance of investment in the social sciences by the ESRC has been skewed towards support for quantitative research resources, and survey methods for generating data. There is some concern to readjust the balance, and to ensure that any potential for linkages between these approaches is identified (Mason 2002:2). The ESRC Research and Resources Board Strategy Document asserts that there is a 'commitment to review, understand and act upon the particular needs of qualitative research which is a large and very important part of UK research activity in the social sciences' (quoted in Mason 2002). To this end the Board commissioned a systematic review of qualitative data resources with a

particular concern to consider the actualities and possibilities for scaling-up qualitative research resources, for qualitative data sharing, and qualitative data provisioning. This review was undertaken by Karen Henwood and resulted in a report, Henwood and Lang (2003).

The report produced a number of recommendations for development in the area of qualitative research resources in relation to archiving, policy, ethics, scaling-up or synthesising qualitative research, teamwork and collaboration, technology, infrastructure and innovation, and training and development. But a major recommendation was that the ESRC should 'undertake a feasibility study to look into ways of developing a qualitative longitudinal strategy as part of its current research portfolio. This feasibility study should identify and thoroughly discuss a wide range of models of possible ways forward' (Henwood and Lang 2003:11). The ESRC is responding to many of the recommendations of Henwood and Lang (2003) through a number of organisational and institutional channels, the Feasibility study reported here is a direct response to the recommendations of the report.

1.2   What can qualitative longitudinal research contribute?

Henwood and Lang found in their consultation that longitudinal research was seen as much more associated with quantitative studies, with a number of established ongoing quantitative investigations. Explanations for lack of QLLR (qualitative longitudinal research) related to funding pressures and lack of time given to researchers to study. The value of QLLR for both academic and policy research was recognised, for example QLLR is increasingly recognised as a key method for policy evaluation, and Henwood and Lang encapsulate the responses they received on the advantages of QLLR as follows:

> Panel studies based on a quantitative model are unable to access the fluid and often highly situation-specific experiences, understandings and perceptions that mediate the ways in which people deal with and respond to social change. In contrast, qualitative studies are able to provide such a deep and detailed treatment. They are highly sensitive to contextual issues, and can illuminate important micro-social processes, such as the ways in which people subjectively negotiate the changes that occur in their lives at times of personal life transition (e.g. the transition to motherhood or fatherhood). They make it possible to investigate how people's everyday attitudes and actions are embedded in patterns of socio-cultural change, such as those that question previously taken-for-granted assumptions and beliefs about social roles (e.g. about the gender division of parental roles). As a result of their characteristic sensitivity to context, qualitative investigations are also able to combine a concern for micro-and macro-social processes. (Henwood and Lang 2003: 49)

In general, qualitative methods have a different claim to validity than quantitative. Where the latter iron out details, enabling comparison on the basis of averages and trends, qualitative methods enable us to understand the importance of what might be statistically insignificant differences, 'distinguishing the enduring from the transient in social action' (Pollard and Filer 2002: 7). Over time it becomes possible to distinguish those differences that have consequences, and how change is differentially experienced and acted on by individuals and groups. Qualitative longitudinal methods can offer fresh perspectives into established arenas of social enquiry, drawing attention to the psychological and biographical processes ('lived through experience') through which social outcomes are generated and mediated.

The growing interest in QLLR may be associated with:

- Holistic approaches to policy, focusing on the individual rather than the issue, and understanding the often subtle interaction of factors shaping processes such as social exclusion, resilience and risk;
- Interest in the notion of the career – in relation to traditional areas of work, or in terms of drink, drugs, sex, mental health etc.;
- The impact of theories of individualisation and detraditionalisation that suggest an uncoupling of agency and structure that have drawn renewed interest in the biographical and the self conscious process through which individuals create their own projects of self – encouraging the use of life history and biographical methods over time.

2.   POSITIONING QLLR WITHIN LONGITUDINAL STUDIES

In 2002 the ESRC developed a National Strategy for longitudinal studies, working with six key principles:

- Longitudinal studies are long-term investments with increasing returns to duration.
- Gaps in the portfolio must be identified, understanding that current users may not always be able to identify these gaps.
- Complementarity between studies meeting distinct needs is critical to the strategy
- The strategy must depend on complementarity and collaboration between funders
- High standards of data quality are essential for longitudinal research.
- Data usage is central to the strategy, prioritising data usability and training
  (ISER 2002: 1)

The strategy paper outlined a number of gaps in current provision, including: longitudinal data on ethnic minorities with adequate sample sizes; better data on youth transitions; bridging the gap between 1970 and 2000 in the cohort studies; longitudinal data on ageing.

This strategy is in the process of being realised, with studies being undertaken into the feasibility of new longitudinal studies in the area of minority ethnic communities (Owen and Green 2004), the commissioning of a new longitudinal study of young people by the DfES and the establishment of ELSA, the English Longitudinal Study of Ageing. In addition, objectives concerning the development of longitudinal methodology research requirements are being addressed through the creation of quality profiles (Buck 2004). Objectives concerning training needs for longitudinal research and other mechanisms for outreach and user engagement are also being addressed through the activities of the ESRC Research Methods Programme and the NCRM. The forthcoming ESRC initiative to support the secondary analysis of data is likely to further support secondary analysis of longitudinal data sets.

As yet the National Strategy on longitudinal studies has been exclusively concerned with quantitative research, which is archived and available for secondary analysis. Consultation with the Chair of the National Strategy Committee has established the value of encouraging dialogue between quantitative and qualitative approaches to longitudinal study, pointing to the potential for locating qualitative longitudinal activity within the remit of the National Strategy Committee. Discussions we have had with those involved in quantitative longitudinal studies suggest that there is much potential for collaboration between qualitative and quantitative approaches to longitudinal research. For example, it has been suggested that: existing and new longitudinal studies would benefit from the addition of qualitative elements; and that there

is potential for purposive sampling within existing longitudinal studies in order to provide samples for qualitative enquiry.

But there is some scepticism in the quantitative longitudinal research community about the value of a stand-alone qualitative longitudinal study. Whilst interested in mixed methods and sympathetic to collaboration, they remain firmly situated in their own research paradigm. Our literature review and consultation with academics using qualitative longitudinal methods, with some funders, government research managers and archivists suggest that there is in fact considerable support, and a clear scientific rationale for qualitative led or purely qualitative longitudinal research, although forms of collaboration with quantitative longitudinal research are favoured by some.

What is at issue is whether the qualitative longitudinal perspective and approach will lose its unique value (which becomes more apparent throughout this paper) and be subsumed within the quantitative framework, or whether this value, and its potential contributions to society, social theory, social policy and indeed people's lives can be realised. There is an immense, multidisciplinary field of qualitative longitudinal research. If some of this can be harnessed (in the same way as the quantitative field has been), and enabled to progress with adequate infrastructure and funding, a considerable contribution will occur. One route is to incorporate qualitative longitudinal study into the national strategy for longitudinal studies and the remit of the National Longitudinal Strategy Committee. A member of the committee has pointed out that their concern is with co-ordination, value for money and methodological rigour, which is not necessarily only associated with quantitative approaches. Incorporating qualitative longitudinal study under this umbrella might require bringing more qualitative researchers onto the committee. What is essential is that the unique scientific contribution and value of qualitative longitudinal research should be recognised and supported within a suitable framework.

3.   A BRIEF REVIEW OF THE LITERATURE

QLL research may be a developing paradigm that 'has yet to be articulated and clarified' (Neale and Flowerdew 2003:189), but it is by no means an emerging methodology in certain research communities. The QLL literature is considerable and involves a number of 'classics'. These tend to share an ethnographic approach and have largely been conducted within the fields of anthropology, community studies, education and psychology. Alongside the studies, commentaries and handbooks have been produced, for example exploring methodological good practice in longitudinal studies in general (Bjleveld and van der Bjleveld 1998), the application of a longitudinal perspective to policy frameworks (White et al. 2000, Rist 1994) and proposing a new 'dynamic' framework for theory and analytic practice (Walker and Leisering 1998).

Our mapping of the QLL literature was aided by the multi-disciplinary and international nature of our initial email inquiry. The broad sweep approach suggested that QL research approaches and methodologies vary according to research community, and awareness of them is frequently restricted to specific research communities.

3.1   Some definitions

As QLL studies appear across social science disciplines, definitions vary with disciplinary, theoretical and methodological focus.   Epstein for example suggests three types of QLLR

characteristic of anthropology and community studies: (1) continuous research in the same small society over a number of years; (2) periodic restudies at regular or irregular intervals; (3) return after a lengthy interval of time has elapsed since the original research (2002: 64). Others specify the amount of time, for example at least one year (Young et al. 1991); multiple waves of observations over a substantial calendar time involving months or years (Kelly and McGrath 1988: 135); or as in life course research, amassing qualitative and quantitative data over several generations to describe and predict human pathways from the cradle to the grave (Ruspini 1999, Heinz and Kruger 2001). Young, Savola and Phelps (1991) are more prescriptive, arguing that QLLR in the social sciences should involve at least 2, ideally 3 waves of data collection over at least a year. QLLR is distinguished by the deliberate way in which temporality is designed into the research process making change a central focus of analytic attention (Thomson et al. 2003:185).

After reviewing many definitions of QLLR, Saldana (2003) argues that it is important to acknowledge that each study is context-specific and driven by its particular goals, research questions, conceptual framework and methodology (Saldana 2003: ix). He illustrates this conclusion that there are many models of QLLR and that no model is more QLL than any other, by using three very different studies of his own as examples: The Theatre Response, a panel field experiment using qualitative interview data to assess children's aesthetic development across seven years; Survival, an educational ethnography of a unique school culture across 20 months; and Barry, the (prospective and retrospective) life history of a theatre student participating in his art (Saldana 2003 :2).

Although he does suggest that 'Longitudinal means a lonnnnnnnng time' (Saldana 2003: 1; see too Thomson and Holland 2003: 241 for a participant response to length) and identifies the three foundation principles of QLLR as duration, time and change, he also emphasises the importance of time and change processes as contextual: 'Since time is and our social actions and circumstances within it are contextual, change is contextual' (2003: 9). He has then a flexible notion of what change means: 'I feel we should be flexible and allow a definition of change to emerge as a study proceeds and its data are analysed. Ironically yet fittingly, we should permit ourselves to change our meaning of change as a study progresses' (Saldana 2003: 12).

The following sections give some examples of QLLR from the literature of studies in a range of disciplines, covering a wide range of topics. Despite the discipline and research community boundaries that we have found, it is sometimes difficult to locate a study in a particular discipline, and there are overlaps in the headings used below signalling perhaps both the fluidity of some disciplinary boundaries, and the need for cross and multidisciplinary work in some areas. Given the immense literature we are tapping into, the review can but be brief and selective, including largely studies from the UK, but also other European countries, the USA, Australia, and New Zealand.

3.2 Anthropology and community studies

An immediate example of blurred and contested boundaries is that between anthropology and community studies. Many of the past and present QLL studies take place within these disciplines. Whilst anthropological studies may, in some ways, be considered to be community studies, the community studies literature tends to straddle disciplinary boundaries, including sociology, anthropology and geography or urban studies.

Clearly, many of the classic studies were conducted within these fields, including: the anthropological work of Mead, Radcliffe-Brown, Evans-Pritchard and Levi-Strauss; the urban ethnographic tradition of the Chicago School (Lynd and Lynd 1929 1937, Wirth 1938, Whyte 1943 1955) and family and community studies in the UK such as Young and Wilmott's studies of the family in Bethnal Green (1957), Stacey's Banbury studies (1960 and 1975), Elias' 1950s study of 'the established and the outsiders' in Winston Parva on the outskirts of Leicester (Elias and Scotson 1965), Rex and Moore's (1967) study of race, community and conflict, and Pahl's Isle of Sheppey study (1984).

Follow up studies of such communities have involved the same researcher(s) (Stacey 1975) or other researchers (Devine 1992, Warwick and Littlejohn 1992). The Lynd and Lynd study of Middletown 'became a sociological reference point' (Bell and Newby 1971: 82) that was revisited by the Lynds themselves and many other up to the present day (Caccamo 2000). Community studies in Bethnal Green, Wolverhampton and Woodford, were followed up in a study of older people in the 1990s by Phillipson and colleagues (1996, 2001). (For further details on community studies see Bell and Newby 1971,1974, Crow and Allen 1994, and for an analysis indicating that the theorisation in early community studies (based on empirical research) prefigured some current high level theorisation that tends to by-pass the collection of empirical data, see Crow 2002.)

Two collections of anthropological studies, themselves providing a review of the field over time, yield a fascinating picture of the range and complexity of qualitative longitudinal work undertaken in this field (Foster et al. 1979a, Kemper and Royce 2002). Each provides considerable insight into an established canon of long-term anthropological enterprise. This impressive body of long-term research is an important resource, providing a wealth of research experience. It has involved the development of a necessarily flexible approach, adapting to changes in the nature of the community; in the needs, goals, options and world-views of community members; in the political landscape; and in the relationships between researchers and community members. Importantly, it illustrates how projects need to be organised on the basis of personnel and project size, as Kemper and Royce indicate it is impossible to take on issues of time without the research coming into the frame, including practical questions of how to organise and maintain a team, the domestic politics of a research team, funding and job security issues and intellectual fashions. These considerations, and the body of research provide models for other disciplines and illustrate some differences in the concerns of different disciplines. An example here is concern about anonymity and confidentiality that emerges for many qualitative researchers, inhibiting the sharing of data. We see from the following examples that data sharing and participatory involvement with those studied are well established in anthropology, although perhaps in danger in a constrained funding climate.

Studies may have begun with an individual/ couple but evolved with increasing researcher commitment to their communities and with opportunities for collaboration. Large scale and long-term studies have moved increasingly towards the participation of and collaboration with those who are being studied (e.g.Vogt 2002, on the Harvard Chiapas Project) and have become intergenerational, involving an explicit and intentional passing of the mantle (e.g. Cliggett on 'inheriting fifty years of Gwembe Tonga research' (2002: 239); Kemper on his transformation 'from student to steward' (2002: 284), and Cahn on 'being the third generation in Tzintzuntzan' (2002: 313). These accounts contrast sharply with the image of the lone anthropologist and with the static portrait of a 'typical' year resulting from the 'one-shot' (usually 12-18 month) approach to anthropological fieldwork that currently predominates in a climate of limited research funding (Kemper and Royce 2002).

These studies are distinguished by the explicit way in which practical and ethical concerns about gathering, analysing, caring for and sharing large data sets are addressed. This is directly linked to the concern that tomorrow's QLL studies are being shaped today. Empirical description has remained the key concern and there has been a strong emphasis on systematic and replicable methodology. This practice has relevance for the development of current QLL studies. As Vogt points out:

> The principal advantage of a continuous long-range project over a short-range one, or a series of revisits, is the depth, quality, and variety of understandings achieved – understandings of the basic ethnography and of the trends and processes of change. If the long-range project also involves a sizable team of students and younger colleagues who make one or more revisits and keep abreast of all the publications, then there is the added advantage of having a variety of fieldworkers with varied training and different theoretical biases who are forced to reconcile their findings and their analyses with one another. Vogt (2002: 145).

3.3   Other areas in which QLLR is employed

Within the field of anthropology the time and expense of the methods are justified on the grounds of 'a greater depth and understanding of the whole spectrum of culture achieved through observations over time' (Foster et al. 1979b: 329), including their potential for documenting and accounting for socio-cultural change, for developing predictive models in a context of dynamic and open-ended societies, and to challenge static models of the social world. Other social science disciplines and sub-disciplines in which QLLR is employed include education, psychology, health, sociology, criminology (criminal, drugs, sex work careers), policy studies (policy development and evaluation, policy impact and process), life course/life history studies, and childhood and youth studies. Areas of focus include gender, families, parenting, child development, children and young people, all manner of transitions in life, sexuality, employment, and the impact of new technology. We will give some selective examples here of past and present work in these disciplines and areas.

3.3.1   Education

The value of researching in depth and over time can be seen in the importance of longitudinal qualitative methods in educational research. An outstanding example is provided by the work of Andrew Pollard and Ann Filer in the Identity and Learning Programme (ILP) that followed the educational careers of 17 children between the ages of 4 and 16. Using ethnographic methods, data were collected on three broad aspects of young people's educational development: identity, learning stance and educational outcomes. The study not only yielded insight into the complex processes through which learning takes place, but also provides a unique document of the impact of educational reform over a twelve year period. The study also identified and explained how and why things changed for pupils at key moments of their schooling - at the transition between primary and secondary phases, at year 9 and during the period approaching GCSE - drawing attention to the positive impact that personalised interventions by key adults could have. Perhaps most importantly the study provides insight into the interplay of personal developmental processes and policies seeking to influence these processes. In their final report the principal researchers point out that:

> The development of personal identity and of life-narratives as ways of creating meaning through life is of enduring significance for human-kind. Such ideas are deeply embedded

within our cultures. However, the modern world also remorselessly presses for short-term performance in the drive for economic competitiveness and efficiency, and implicitly undermines other legitimate concerns for the quality of life. Further, there are also indications that such imbalances have the unintended consequences of depressing social adjustment and long-term motivation and can create and amplify exclusion. Ironically, such effects could actually depress short-term performance – thus raising fundamental questions about the most appropriate conceptualisation of learning, teaching and education for modern societies (Pollard and Filer 2002: 22).

Other ethnographic approaches to QLLS in educational research and sociology of education include Corsaro and Molinari on early education in Italy (2000) and Gordon et al. (2000) comparing secondary schools in Finland and England with young people aged 13/14. The Finnish sample has been picked up at 18, 20 and 22 for a further QLL study, Tracing Transitions (Gordon and Lahelma 2003, Lahelma and Gordon 2003). Shirley Brice Heath conducted a ten-year ethnographic study of language acquisition (1982, 1983).

Walkerdine, Lucey, and Melody (2001) in a classic study that drew its sample from earlier research (Tizard and Hughes 1984) have been following a group of 30 middle- and working-class young women from the ages of 4 to 21 with repeat interviews (and other methods including video diaries) at long intervals, and have thrown light on the ongoing importance of social class in the educational paths of these young women. Whilst examining the 'remaking of girls and women as the modern neo-liberal subject; a subject of self-invention and transformation who is capable of surviving within the new social, economic and political system' they show that 'class still insists upon its presence even in the midst of its remaking. The terrible and central fact is this: it is social class that massively divides girls and young women in terms of their educational attainment and life trajectories' (2001: 3-4)

The 12 to 18 Project set out to understand how people entering high school see themselves, school and their future, following girls and boys in four different types of schools in Melbourne, Australia, with twice-yearly interviews and videotapes (Yates, McLeod and Arrow 2002). Like Walkerdine et al. they are interested in issues of gender and class (Yates 1999), and gendered subjectivity (McLeod 2000), and also in methodology (McLeod 2003, Yates 2003)

Galton et al. (1999) repeated an observational study of primary classrooms first undertaken in the 1970s (Galton et al. 1980) in the 1990s, a smaller study, in some of the same schools, making the same observations. They found the primary classroom a different place in many respects, as might be expected given the passing of time and the dramatic policy changes over the period. But they found it remarkable how much had not changed, in terms of the proportions of particular types of talk (teachers statements, questions) and interaction (individual, group, whole class) and suggested that such 'conservatism' amongst primary school teachers may in fact be an attempt to maintain an element of stability in the primary classroom, a pragmatic response to a period of continual change. They suggest that the fun has gone out of the later years of primary school, with similar pressures as secondary for both teachers and pupils (subject curriculum, constant SATS pressure). These classroom processes and pressures and fragmented style of teaching with different teachers as in the secondary school, also produce in the primary school the 'intermittent attender', the lack of attention on the part of the pupil that is produced by the processes of the secondary school.

There are many studies of educational transitions, including the transition to work, for example Griffin (1985); Ball, Maguire and Macrae (2000); Kuhn and Witzel (2000) life-course research in

Germany; and the work of Philip Hodkinson which covers transitions from FE and Masters degrees, and learning careers (Hodkinson, Sparkes and Hodkinson 1996, Bloomer and Hodkinson 2001, Hodkinson and Bloomer 2001, Hodkinson and Bloomer 2002). Brooks (2003) covered the transition from school to HE. Hodkinson also undertook an evaluation of school-based Initial Teacher Education, tracking trainee teachers through two years of university courses and school experience, using a method of tracking stakeholder groups developed in an earlier study (Hodkinson and Hodkinson 1997). Taylor (2003) examined the impact of graduate school in adult education on practicing adult educators' beliefs about teaching, and Rothwell (2002) examined the effect of contemporary staffing strategies on the quality of FE service provision in the East Midlands.

A further evaluation study in education employed QLL methods: the evaluation of the Andhra Pradesh Primary Education Project included elements of structured classroom observation, and case studies of schools, conducted over a seven year period (Lacey, Cooper and Torrance 1993, Torrance, Cooper and Lacey 1997)

3.3.2 Psychology

Psychology is also a field in which there has been considerable research on behavioural change over time, particularly in the area of both child and adolescent development. An example here is a study of emotions set within a larger longitudinal study of children's friendship, using a 'real emotion' interview with the same children at ages 3/4 and 6/7 (Cutting and Dunn 1999, Hughes and Dunn 2002). Carol Gilligan in the USA conducted an influential series of longitudinal studies using questionnaires, intensive qualitative interviews, psychological tests and institutional records, between 1981 and 1990. The studies covered a range of issues, including how adolescent girls of different ages understand and describe themselves, their relationships and morality; how schools can positively affect adolescent development; how adolescents think about and make choices and how that is related to their sense of self; and the development and education of adolescents (Brown and Gilligan 1992, Gilligan 1993). Gulbrandsen, Haavind and Hauge have looked at the development during adolescence of young people from immigrant families with permanent residence in Norway using theoretical perspectives from cultural and critical psychology. The young people were interviewed first at 12-14, then at 15, and latterly at 17-18, along with classmates and teachers at certain points (Gulbrandsen 2003, Haavind 2003a, b).

Theories of individualisation are key to identity research but Kraus (2000) and colleagues' ten-year research on identity development from 1989 provides an example of how this type of theorisation was taken up in psychology at a time when little work had been conducted from this perspective. The empirical core was a five-year longitudinal study with three waves of interviews with young adults. Smith too undertook a study of identity development this time during the transition to motherhood (Smith 1994, 1999a, 1999b), and Nicolson examined the transition to motherhood and postnatal depression, gathering biographical information and their experiences of depression (Nicolson 1988, 1998, 2001). At the other end of the life course, Coleman has studied ageing with the use of qualitative longitudinal case studies of particular individuals (idiographic) (Coleman 2002). And similarly looking at older people, Hardcastle has explored exercise behaviour change to learn how a person changes from being sedentary to becoming active, to understand the mediators of change (Hardcastle 2001, and Hardcastle and Taylor in press).

A social psychological perspective is offered by Henwood and Proctor (2003) in a two year study of paternal involvement in first-time fatherhood, with three interview rounds when partner was 5-8 months pregnant and when the baby was 2-4 months and 4-9 months old. Draper (2003) has also undertaken a qualitative longitudinal study of men's experience of transition to fatherhood. In the area of therapy, Hallebone has undertaken a longitudinal study of women undergoing therapy over a period of years, in which she identifies 'progressive' and 'regressive' trajectories (Hallebone 1992).

3.3.3   Health Studies

Health is an area well suited to the use of qualitative longitudinal methods, and often studies are of mixed method, with statistical information being gathered alongside some qualitative data. An extensive longitudinal study, the Avon Longitudinal Study of Parents and Children aims to understand how the physical and social environment interact, over time, with the genetic inheritance to affect the child's health, behaviour and development. The study is designed to link together information from a variety of sources, including hands on examination of the children, questionnaires completed by parents, health records, biological samples and measurements of the environment in the home, and to test hypotheses on the causes and prevention of childhood ailments and disorders. The basis of the sample is 14,000 children born in 1991 and 1992. At age 7 physical characteristics were assessed, and at age 8, cognitive and behavioural attributes. These assessments form the end point of a number of specific studies, but also the baseline for the future. The original remit has expanded and many research projects, including some related to genetics, are nested in the broader framework of the study (Parmenter 1993, Simmons 1994, Golding 2000, Sidebotham 2001, Waylen et al. 2004).

Other studies in the health area deal with symptoms, e.g. Woodgate et al. (2003) a study of children's and families' perspectives on the childhood cancer symptom course which took place in Western Canada from July 1998 to December 2000; with the impact of treatment, e.g. Martin et al. (2003) a study of adolescents' perceptions of living with an Ilizarov frame; patient expectations, e.g. Wiles et al. (2002) a study of patient expectations of recovery following a stroke; with the impact of health inequalities, e.g. Mullings et al. (2002) a study of reproductive experiences; informal caring, e.g. Neufeld and Harrison's (2003) study of the impact of caring and lack of support on women caregivers; and with mental health, e.g. Drury's (2003) study of the experiences of people who are mentally and homeless, from discharge from mental hospital through their first two years of community housing.

The BMA cohort study of 1995 medical graduates is a 10-year longitudinal study of the career paths of 545 doctors, largely quantitative, with an annual survey of participants' activities via a postal questionnaire, but with a qualitative follow up by a series of focus groups.

A famous and influential longitudinal study in the area of health is the Whitehall II study which started in 1985 and originated in the first Whitehall study set up in 1967, which showed that men in the lowest employment grades of the civil service were much more likely to die prematurely than men in the highest grades. The Whitehall II study was set up to determine what underlies the social gradient in death and disease and to include women. Of those civil servants at all levels invited, 10,308 (73%) participated in the baseline survey, of which two-thirds were men and one-third women. In addition to a medical screening all participants were sent a self-completion questionnaire that covered a wide range of topics. The first phase was completed in 1987, since when there have been a further six phases of data collection,

alternating postal self-completion questionnaires with medical screenings and questionnaires. Phase 7, currently (2002-2004) underway includes a medical screening. At phase 6, there were responses from 7,357 participants, or 71% of the original group. Similar studies are underway in Japan, France and Finland, and one is proposed in Washington. There are a very large number of publications (see website: www.ucl.ac.uk/whitehallIII) of which some are: Marcenes et al. 1993, Ferrie et al 1995, Carroll et al. 1997, Mein et al 1998, 2003, Head et al. 2004.

Rousseau et al. (2003) provide an interesting example of the combination of a randomised controlled trial accompanied by qualitative longitudinal study, examining the impact of computerised evidence based practice guidelines in primary care. They studied the attitudinal and contextual influences on the use of a computerised decision support system in five general practices. And similarly working in general practices, Dowswell et al. (2002) carried out three rounds of individual interviews with 49 GPs, to gather their perceptions of the early days of primary care groups. Each of these could also be seen as evaluations of policy, in this case health policy.

Since 1997, the Department of Health has funded 'The Birmingham Untreated Heavy Drinkers project' investigating the natural history of untreated heavy drinking. A cohort of heavy drinkers has been interviewed at two-year intervals for four waves (original cohort 500, now 320) (Dalton and Orford 2001, Orford et al. 2002a, b, Hartney et al. 2003).

A further Department of Health funded longitudinal project was the Bangor Longitudinal Study of Aging, which crucially combined quantitative and qualitative research, partly as a result of the desire of the funders for a survey, and the researcher for qualitative research. Over 500 elderly people drawn from populations samples from a range of rural communities were interviewed in 1979, traced and re-interviewed in 1983, 1987, 1991, 1995 and finally in 1999 (the survey was conducted in respondents homes and aimed at examining the vulnerabilities and needs of 'the elderly'). Between 1983 and 1987 an intensive qualitative study of a sub-sample of 30 people was conducted, involving visiting each of them two to four times a year and spending approximately half a day with them talking about their lives and recent experiences. A crucial factor in the success of this study was the interaction between the different types of data generated. A typology of support networks was derived from the qualitative study, but hypotheses raised by this were tested in the quantitative study. The use of qualitative data also led to different interpretations of the quantitative data in the analysis over time (Wenger 1984, 1994,1999).

Clearly much of the work in this section both has relevance for policy decisions, and can be used to assess the impact of policy changes and developments, and in some cases has been funded by policy makers or government departments.

3.3.4   Sociology

Recent theoretical directions in sociology that address processes of change have drawn on concepts such as individualisation, detraditionalisation, dissembedding in the context of a risk society, which see traditional supports and groupings eroding and the individual cast into a reflexive project of self, to make their own decisions and route in an ever changing society marked by disruption and contingency. A number of researchers have sought empirical as well as theoretical routes to challenge this conception of post- or high-modern society. Such studies have often taken young people's lives and transitions as the key site to examine or elaborate these processes (Furlong and Cartmel 1997) and qualitative longitudinal methods, often involving repeat biographical interviews, as an appropriate approach (Du Bois-Reymond 1998, Du Bois-Reymond et al. 1994, Nilsen and Brannen 2002, Neale and Flowerdew 2003,

Thomson and Holland 2004, Gordon et al. 2004) and we discuss some of this work below. As we have seen in the education section above, youth transitions are in general a favoured topic in youth studies.

More generally, Rosen and colleagues used a longitudinal qualitative approach (initial interviews with a follow up six months later) in a study of the acquisition and implementation of information technology into three distinct organisational contexts: a set of hospital labs, a national UK retailer and a British university. The research focus was on the perspectives of users, looking at the different professional, cultural and social groupings within the three organisations, and they identified factors that mediated the processes studied: gender norms and identity, organisational cultures, and professional knowledge and skill (Mclaughlin and Webster 1998, Mclaughlin et al. 1999). Symon (2004) has also been concerned with IT development in a qualitative longitudinal case study of a UK public sector organisation over four to five years, exploring changes to participative strategies with respect to users during the development and implementation of networked individual workstations. Methods used were interviews and repeat interviews, diaries, observation and survey and Symon is particularly concerned to develop an adequate analysis of change processes in qualitative longitudinal studies.

Bytheway (2004), pursuing an interest in gerontology, is undertaking a study of the social and personal significance of birthdays in adult life, using the Mass-Observation Archive to study longitudinally attitudes and experiences of Mass-Observation panel members in relation to ageing, and in particular birthdays.

Qualitative longitudinal studies have been used in a range of sociological studies, and in it sub-fields and disciplines. In constructionist approaches such as discourse analysis for example, longitudinal methods have been used to examine how people construct concepts and views of the social world, and how these change over time (Coupland and Nussbaum 1993). We have subdivided sociology into life course/life history, children and youth studies, and criminology, but often with difficulty.

3.3.4.1 Life course/life history

In this section we find classic studies of life course and life history. Elder (2001: 1)) outlines the value of this approach in understanding change and society, emphasising history, context and change in intersection with the lives of individuals and groups:

> Lives are lived in specific historical times and places and studies of them necessarily call attention to changing cultures, populations, and institutional contexts. The life course is structured by life transitions, by linked events and transitions as trajectories, and by systems of age grading. If historical times and places change, they change the 'way people live their lives'. And this change alters the curse of development and aging. Likewise, changing people and populations alter social institutions and places.

His first major work was Children of the Great Depression: Social change in life experience, (1974), which examined the lives and historical context of two California birth cohorts who lived through the Great Depression, the Oakland Growth sample (birth dates 1920-21) and the Berkeley Guidance sample (birth dates 1928-29). Each cohort lived through the Depression, World War II and post war era of greater prosperity, but encountered these events at very different times in their lives resulting in differential influences and effects. Elder favours a

combination of qualitative and quantitative approaches (Giele and Elder 1998) and has undertaken many studies based on the life course approach. Elder, Pavalko and Clipp (1992) employed recoded archival data from the Terman study, the oldest longitudinal study with people born in 1902-20 followed up with 13 waves up to 1992. The Iowa Farm Study of family generations started in 1988 with 451 families using both quantitative and qualitative data, including observational videotapes of families interacting. They were recontacted briefly annually until 1994, and it is planned to continue until 2005 (Conger and Elder 1994, Elder and Conger 2000). Elder is now working with data from the National Longitudinal Study of Adolescent Health, which includes data on ethnic diversity, family and friends.

For a further study from birth to death of a group of disadvantaged men born during the depression, using mixed methods, see Sampson and Laub (1993) and Laub and Sampson (2003). Born in Boston in the late 1920s and early 1930s, these men were the subjects of the classic study Unraveling Juvenile Delinquency by Sheldon and Eleanor Glueck (1950). Sampson and Laub have retrieved and (re) analysed this data, updating it with new interviews. This is a life course study of delinquency.

Paul Thompson argues eloquently for bringing together the strengths of both qualitative and quantitative methods in a middle way, research using two eyes instead of one embedded in a dichotomised approach (2004, see too Bertaux and Thompson 1997). He supports and illustrates his position from his own research, including a life course study using cross sectional analysis and individual illustrative stories drawing on a census-based national quota sample (Thompson 1975) and a study of growing up in stepfamilies, drawing a sample from the National Child Development Study, a quantitative longitudinal study of the birth cohort of March 1958 (Gorell Barnes et al. 1997). Thompson has pioneered the development of life stories and oral history in sociology and social history (Thompson 2002).

Some of the studies mentioned here draw on samples set up by other researchers, perhaps drawing a qualitative sample from a quantitative cohort study, or use data generated by other researchers (often archived), reanalysing the material, and updating with further interviews with the original sample. As with work in anthropology, these approaches can provide models for the social sciences more generally.

3.3.4.2 Childhood and Youth Studies

Since young people are by definition in a period of transition between childhood and adulthood, youth transitions have been widely examined with the use of qualitative longitudinal methods and a wealth of material has emerged from this field. Some of these, particularly examining the transition from school to work or higher education, have been mentioned earlier.

Neale and colleagues (Neale et al. 2003) in a recent study 'Enduring families? Children's long-term reflections on post divorce family life' have followed up children from three earlier linked projects on divorce, themselves qualitative longitudinal in form (Smart and Neale 1999, Smart, Neale and Wade 2001). A prime concern was to explore what matters to young people themselves, and whether or not their views and feelings dovetailed with legal and welfare presumptions about their best interests. Neale has been particularly interested and involved in developing qualitative longitudinal methodology (Neale and Flowerdew 2003, Neale 2004).

The Life-Patterns longitudinal study in Australia involves both qualitative and quantitative research tools, but with a strong emphasis on the qualitative, particularly in regard to a

participatory methodology. It is a panel longitudinal cohort study of 2000 young Australians who left secondary school in 1991, whose lives have been studied annually since, and are now around 30 years old (Dwyer and Wyn 2001, White and Wyn 2004). Wierenga (2002) followed the lives of 32 young people in rural Australia (interviewed at ages 12, 14 and 16) for five years intent on 'storying' - the act of listening to, telling, re-telling or revising a story - as an ongoing creative endeavour. She shared stories of past, present and future with the young people and class and gender emerged as major issues, but in this instance they were about what people do with their resources and relationships, about their social practice rather than categories of people or groups (2002: 17).

In Germany Keddi and her colleagues have been investigating 'Young women's themes of life in East and West Germany and those of their partners', interviewing 125 young women (aged 18-27 at the start) and some of their partners four times over a period of seven years, focusing on life-plans and life-situations (Keddi et al. 2003, Keddi 2004).

Gordon and Lahelma (2002) have picked up an earlier sample of young people in Finland in a school ethnography (13/14 year old at that time) at 18 and upwards, to trace them through transitions to adulthood with repeat individual and group interviews and other methods. This study is running parallel with a longitudinal study undertaken in several contrasting sites in the UK and NI by Holland, Henderson and Thomson and colleagues (Thomson and Holland 2004, 2005, Thomson et al. 2004). The latter drew a sample (100) from a previous study of youth values to follow young people through their construction of adulthood, and in a third study to examine the social capital (and material and other resources) to which they have access (1996 to date and ongoing) using repeat biographical interviews and other methods (Henderson et al. 2007).

MacDonald et al (2004) have similarly followed very hard to reach young people across three studies, starting in the early 1990s in a study of the longer-term transitions of young adults in neighbourhoods beset by the problems of social exclusion in extreme form. The researchers argue against those who attack the concept of transition as leading to narrowly restricted economism, and reassert the value of the perspective. For them, class still matters, youth transitions have become extended, complex and unpredictable, but the inherent risks involved are disproportionately borne by those sections of the youth population with the least resources to deal with them (2004: 4) (MacDonald and Marsh 2001, 2002, MacDonald et al. 2001)

Nielsen and Rudberg (1994) use a qualitative longitudinal approach with biographical interviews to examine processes of individualisation through time in the lives of three generations of women, young women, their mothers and grandmothers in Norway. They argue that modernity can be traced through the creation of phases of the gender order. First a phase of gender polarisation, second a phase characterised by battle between the sexes, and third the emergence of female individualisation. For them, male individualisation is synonymous with modernity and women were spectators of the process. Female individualisation occurs at a later stage when 'the costs of progress are more visible' (48).

Du Bois-Reymond and colleagues, (du Bois-Reymond 1994, du Bois-Reymond et al. 1998) similarly undertook a longitudinal intergenerational study of adolescents and their parents in the Netherlands starting in 1988 when the 120 young people were 15-19 and using repeat biographical interviews over a nine year period. On the basis of an intergenerational comparison, they developed Beck's concept of a modernized 'normal biography' and a 'choice biography', which are class related, testing it empirically (Peters 1995, Ravesloot 1995). They

point to the doubleness of the female biography that even in its modern shape carries with it the burden of traditional destination and definition. They also examine young people's perceptions of youth and adulthood (Plug et al. 2003)

Bagnoli has used an intensive multi-method autobiographical approach with a longitudinal element of repeat interviews, involving young people who are migrants between Italy and England as co-researchers in reflection on their lives and the construction of their identities. The young people's narratives indicate that reconstruction of identities in the face of the contingencies of late modern societies can be associated with a great deal of pain Bagnoli 2001, 2003)

3.3.4.3 Criminology

Criminology has an established qualitative longitudinal tradition from both psychological and sociological perspectives. The Edinburgh Study of Youth Transitions and Crime is a long-term longitudinal study of criminal offending and anti-social behaviour among young people currently funded by the Scottish Executive and the Nuffield Foundation. It is studying the life stories of 4,300 young people who started in Edinburgh secondary schools in the autumn of 1998, when they were aged about 12. It builds on the Cambridge study of Delinquent Development from the 1950s, but breaks with previous tradition in a number of ways. There is a focus on gender differences, an effort to explain why childhood criminal inclinations can result in serious, frequent and persistent criminal offending but often do not, and to integrate where possible the study of individual differences and life histories with the study of effects of communities and broader social context. The main purpose of the Edinburgh Study is to find out more about the causes of youth crime so that more can be done to prevent it (Smith 1999, McVie 2003, Smith and McVie 2003, Shute, forthcoming).

Similarly in the USA the Project on Human Development in Chicago Neighborhoods directed from the Harvard School of Public Health in Boston, has brought together scientists with a wide range of disciplines to follow 7,000 individuals and 80 communities in a coordinated effort to study the origins and the natural history—the many intricate pathways—of social competence and antisocial behaviour. This is a quantitative study with associated qualitative elements, with an accelerated longitudinal design. Instead of following a single group for thirty years or more, they started with nine different age groups, from prenatal to age 18, and followed them for eight years. The age groups are separated by three-year intervals, and the researchers are drawing statistically meaningful conclusions about some aspects of development from birth to age 26 (Earls 1999, Sampson et al. 1999, Sampson 2000). More recently, the Project has added two new elements: a study of children's exposure to violence and its consequences, and a study on childcare and its impact on early child development. By looking at individuals and their communities—and individuals in their communities—as each change over time, the Project aims to unravel the complex influences of community, family, and individual factors on human development. (http://www.hms.harvard.edu/chase/projects/chicago/about/connect.html)

Other areas in criminology in which qualitative longitudinal methods have been used include experiences of probation, police training and practical experience on the street, risk and resilience in criminal careers, and various and varied investigations of drug use, the latter often in the form of policy or service evaluation. Farrall has undertaken an investigation of the impact of probation supervision on the lives of 200 men and women, between 1997-2000, following them for two years regularly interviewing the probationers and their supervising officers, and is currently retracing the group (Farrall 2002, 2003, 2004, Gadd and Farrall 2004, Maruna and

Farrall 2004). Drawing on Bourdieu, Chan (2003) undertook a cohort study combining qualitative and quantitative methods to explore the relationship between police training in the academy and practical apprenticeship on the streets. Armstrong et al. are coordinating an ESRC Priority Network at the University of Sheffield looking at 'Pathways into and out of crime: Risk, resilience and diversity'. Their own study in the programme 'Risk and resilience in children who are offending, excluded from school, or who have behaviour problems' uses case studies and a life history approach (Armstrong 2002).

Qualitative longitudinal methods have been found useful for the study of drugs careers (see for example linked studies by Teeman et al. 1999, Aldridge et al. 1999, and Measham et al. 1998, Brochu et al. 2002, Harocopos and Dennis 2003) and sex work for example Plumridge's three year study of female sex workers in New Zealand (Plumridge 2001, Plumridge and Abel 2001, Plumridge 2003).

3.4   Policy

Rist (1994) has argued that the framework within which the contributions of policy research in general and qualitative research in particular can best be understood is that of the policy cycle, which has three phases – policy formulation, policy implementation, and policy accountability, each of which has its own logic and information requirements. In the first phase, formulation, he considers that qualitative research can be highly influential in relation to defining the problem, information about prior initiatives, receptivity to particular approaches by the target groups, and the kind of impacts that might emerge from initiatives. In the policy implementation phase, qualitative and particularly longitudinal qualitative research can provide information about the process of implementation, and evaluation of the effectiveness of any intervention in relation to delivery and impact on the target audience. And at the level of accountability, evaluation of both process and outcomes can be provided by the in depth information available from such research. Rist is writing about social and policy research in general and its application to government policy; Molloy and colleagues discuss the research that government undertakes or commissions in connection with policy.

In a paper commissioned by the Department for Work and Pensions, Molloy and Woodfield with Bacon (2002, National Centre for Social Research) discuss the contribution that qualitative longitudinal research can make to policy making, particularly in the light of government movement towards evidence based policy and practice. They examine the value of longitudinal components to increase understanding of the delivery, impact and durability of outcomes from interventions, the methodological issues associated with qualitative longitudinal research, and explore the implications of using these approaches for costs, timescales and conduct of evaluation studies in government social research. As we have said, change is the main focus of qualitative longitudinal research, and in government social research the type of change studied is in relation to life circumstances, personal attitudes or experiences and people's perceptions of these, and this can produce an understanding of the processes and causes of change which may occur over the course of a policy implementation, programme delivery or other forms of intervention.

Molloy and colleagues give examples of government policy research where qualitative longitudinal approaches have been used, for example in a study of the New Deal for Young People, where people were interviewed at three stages roughly equating to the three phases of the programme (Gateway, Options and Follow-through) (Molloy and Ritchie 2000). This study also included a national quantitative survey of entrants to New Deal (Bryson et al. 2000) that

had a longitudinal element with a six-month follow-up after entry into the programme, the initial survey providing a benchmark. A DfES evaluation of the Education Maintenance Allowance employs a longitudinal component re-visiting a cohort of young people a year after first interview to examine the long-term impact of the EMA on their participation in and attitudes towards post-compulsory education (Woodfield and Graham 2003, Woodfield et al. 2003). This type of research is seen as particularly valuable for policy pilots i.e. test runs of policy, either impact pilots testing the likely effects of new policies or early outcomes, or process pilots exploring the practicalities of implementing a policy in a particular way (Jowell 2003). Molloy et al. (2002) also consider many of the methodological issues involved in qualitative longitudinal research, particularly in relation to evaluation, but of more general interest.

There is then increasing interest in the use of qualitative and qualitative longitudinal methods in research in relation to policy in the government and civil service, which was borne out in our consultation with these groups. Spencer et al. (2004) were commissioned by the Cabinet Office Strategy Unit to undertake a methodological review of quality standards in qualitative evaluation methods, to produce guidance for undertaking research and evaluation that uses qualitative methods and a framework for assessing evidence produced in this way. The aim was to develop excellence in government research and evaluation, in line with the commitment to evidence-based policy. Two broad points were drawn out of the interviews undertaken for this study about the role of qualitative research in government evaluations. Policy-makers and government managers and commissioners sometimes described a need for more support, education and guidance for non-research experts in their use of research, particularly qualitative research. Policy- makers themselves said they would like guidance about when and how to use qualitative research, and about the roles of different qualitative research methods, hoping that the framework produced in the study would be educative in that regard (Spencer et al. 2004: 110).

Many of the studies discussed earlier have policy implications, and can directly or indirectly provide information and evidence on the impact or effects of government policies (local and central). Some are explicitly concerned with the effects of policy on particular groups (for example in relation to criminal or drugs careers, young people's transitions, education, health, welfare etc.). A further example is the CASE (Centre for Analysis of Social Exclusion, ESRC Centre at LSE) neighbourhood study, running since 1999. This is a continuous study for five years of 200 families living in four neighbourhoods (two in East London, one each in Sheffield and Leeds). They are examining exclusion and inclusion, the impact of area initiatives (e.g. Sure Start, New Deal for Communities), education and health, race relations, social networks and social capital, the role of community and community involvement, crime, drugs, disorder and coping strategies, income, work and benefits, and the push-pull factors leading people to move into, out of or stay in these communities (Bowman 2001, Mumford and Power 2003, Power 2004).

A consortium of research organisations led by CRESR (Centre for Regional Economic and Social Research at Sheffield Hallam University) are undertaking a long term evaluation of the 10 year New Deal for Communities programme run by the Neighbourhood Renewal Unit, much of which involves qualitative research, and visiting the areas on an annual basis. MacMillan (2002) has undertaken an intensive, extended, qualitative investigation of a small number of case study community-based projects aiming to capture dynamic change in projects as they occurred. He has called this a 'real time' longitudinal study.

Further studies for example in relation to youth policy and ethnicity include Fieldhouse and Kalra (2002, Fieldhouse, Kalra and Alam 2000) an evaluation of the impact of the New Deal on minority ethnic young people, which used depth interview with 75 young people in Oldham and interviews with New Deal personnel. Britton et al. (2002) undertook a study of the impact of Connexions on the career dynamics and welfare needs of black and minority ethnic young people at the margins as they made their way out of full-time education.

Pickering et al. (2002) undertook a feasibility study into tracking homelessness for the Scottish Office Central Research Unit, arguing strongly for the use of longitudinal methods, both quantitative and qualitative, and including prospective qualitative. Existing longitudinal studies of homelessness, which they reviewed, were rare, both in the USA and UK. They covered the methodological, practical and ethical issues involved in such studies, in relation to a hard to reach and maintain group.

Finally, in relation to education policy, Brown et al. (2003) undertook a five year study at Kings College, 1997-2002, extended to follow up in 2003, the Leverhulme Numeracy Research Programme. This was comprised of six projects: a large-scale longitudinal quantitative survey of pupil attainment and five linked case study projects. The latter were mainly qualitative accounts of classroom experiences, teachers' conceptions and practices, school leadership and action, home and school numeracy practices, and cognitive acceleration intervention. The survey involved two cohorts to span the seven years of the primary school within a five-year study.

3.5   Conclusions to literature review

There is significantly more QLLR than there are discussions of QLL methodology, and those discussions of QLLR methodology that exist do not cover the full range of QLLR literature across disciplines (Foster et al. 1979, Kemper and Royce 2002, Molloy and Woodfield 2002, Thomson et al. 2003, Saldana 2003). To a great extent QLLR is contained within disciplinary and substantive literatures. As Saldana observes, 'virtually no-one outside of theatre education accesses my field's research literature'.

Ideally, QLL research is open-ended and intentional (i.e. to keep on looking is the key concern); relates to the number of waves rather than a period of time; and to a dynamic research process. i.e. the separation between research design and research process decreases. One of the features of this kind of QLLR is that the research process comes within the frame of what is recorded and analysed. QLLR also tends to be linked to personal/collective scholarship. In many cases it is driven by the intellectual projects and ongoing relationships between the researcher and the researched, and researchers have often had to struggle to draw together short term funding solutions. The impetus towards maintaining funding and/or designing prospective studies from scratch brings with it a different set of politics and demands.

The emergence of an explicit QLL methodology that is interdisciplinary, and which might constitute a resource to be shared across the social sciences is a new and exciting development. It is a development fuelled by a range of factors including: a focus on the processual character of social life within social theory; a recognition of the value of QLLR by policy makers and research managers; and a renewed emphasis on the value of secondary analysis and follow-up studies. For these reasons it is likely that that there will be a proliferation of approaches to QLLR. It is vital that in the process of forging a new generation of QLL

studies that the insights already generated within specific disciplines are recognised and built upon.

4.   THE CONSULTATION PROCESS

We began the process of consulting the field by circulating an initial email via a range of mailing lists, explaining the study, asking for examples of individuals involved in QLL research, examples of published work and a statement of interest in being involved in the consultation process. A list was then compiled to which a questionnaire was sent. In addition two consultation meetings were convened, the first with representatives of government departments and social research funding bodies and the second with a group of qualitative researchers with experience of and/or a particular interest in QLL methods. A number of archivists were approached and interviewed individually. Individual interviews were also undertaken with a range of people in order to follow up on specific areas of interest and concern. We participated in two consultation meetings on longitudinal research one hosted by the NLSC and one by the Research Methods Programme. In the following part of the paper we draw on these sources to report on the key questions that have guided our study (Appendix). Individuals will only be mentioned by name when it is necessary to do so. Otherwise comments will be referenced by the medium through which they were gathered. We first address general and practical issues as they arose in the consultation, followed by issues more specific to research practice and process as they arose both in the literature and the consultation.

5.   FINDINGS FROM THE CONSULTATION

Here we discuss potential substantive areas for a qualitative longitudinal research study and related research issues, the implications of particular units of analysis used in qualitative longitudinal research, the scale - size and duration of potential qualitative longitudinal studies, the structure and organisation of such a study, funding and implications for policy as they emerged in the consultation.

    5.1   Substantive areas and research issues

A QLL approach may be particularly useful when attempting to understand the interaction between temporal and geographic movement and between individual/ collective agency and structural determinants. Examples include:

- An approach to the study of transitions (over time, the life course, between generations, states, etc) which privileges the subjective, context and complexity and pays attention to questions of duration, momentum and timing. An example of this is exploring the impact of duration of time out of the labour market for women with children.
- The understanding of how pathways are constituted and negotiated: in and out of poverty, in and out of homelessness, through higher education etc.
- Understanding how changes and adaptations result from particular traumas, events or interventions and the significance of timing and timeliness to social analysis. An example is how people respond to different forms of bereavement.
- Understanding the impact of historical events and changing circumstances on social organisation and human lives. For example exploring the formation of ethnic/national identity pre and post September 11th.
- Evaluation of specific policies or programmes aimed at achieving specific outcomes, filling in the gaps between what policies are intended to do and how people experience them

- Making sense of the movement of people, objects and/or resources over space and time.
- Developing insights into developmental processes such as the construction of identities, organisational change, community development, and maturation.
- Facilitating a grasp of incremental and cumulative processes – how earlier attitudes, behaviour, values etc. influence later ones (what in quantitative research is called 'state dependence').
- Providing a realistic understanding of causality – how resources, timing, agency, circumstance and 'intangible' aspects of social, cultural and contextual processes interact in specific instances to explain differences between individual outcomes (what in quantitative longitudinal studies is called 'residual heterogeneity').

We consulted widely on the kind of substantive areas for which a QL approach might be beneficial – examples included:

Study of the family and the life course, including: formation and dissolution of relationships; the negotiation of home/work responsibilities over time; the impact of key life events such as marriage, birth, parenting, divorce, redundancy, retirement, frailty, death of intimates etc.

Identity construction: 'any area of research concerned with identity construction and formation, change and process. This includes the identities of individuals but also communities, organisations, institutions, geographical locations, nations'

The study of specific processes, such as: ageing; the onset of disability; the onset of chronic illness/ addiction/ problematic behaviours, social mobility.

The careers of key groups about which little is known/ and or who are difficult to define: young people at risk of offending, people who will progress into anti-social behaviour, problem gamblers.

Organisational and community change, including: clinical action research; evaluation of community based policy; tracing of changes in social efficacy within communities, institutions etc.

Trends, including: changes in values and attitudes over time among key groups, changes in behaviour over time, the impact of cultural shifts and specific events on values and behaviour.

Our respondents were concerned that methodology should not drive design, but research questions should be addressed with the appropriate tools. They drew attention to the specific value of qualitative research in that research questions can be generated during the course of the research, rather than established a priori. Certainly, our consultation established that there is a scientific case for qualitative longitudinal research as the position emerged that there are certain phenomena that can only be, or are best studied through this approach. Yet it also pointed towards the potential of QLL methods as a means of discovery: opening our imaginations towards new ways of perceiving and researching social phenomena, seeing below the surface of our research questions and forging new ways of theorising processes of continuity and change.

5.2   Implications of using a particular unit of analysis for such a study?

The kinds of units of analysis that could feature within a QL study reflect the wide variety of studies that could use such a temporal approach, including ethnography, unobtrusive observation: a panel interview study etc. Possible units of analysis include:

- communities;
- organisations (e.g. workplace, school, general practitioner's surgery, children's home);
- physical settings (e.g. beach, shopping centre, playground, town centre);
- events (e.g. leaving/starting school, birth of first child; retirement)
- time periods (e.g. different times of day, of year, annual/ biannual data collection point)
- groups (e.g. families, households, friendship groups, social networks, classes, age cohorts)
- individuals

All units have ethical, analytic and cost implications. The larger the unit, the greater are the risk of dispersal and attrition, which may jeopardise validity and the accumulation of analytic power over time that is a feature of longitudinal research. In organisational and community research the unit chosen may be dependent on the continuation of particular policies and or demographic patterns. Research with families and other groupings raises particular ethical problems concerning internal confidentiality.

In many ways the individual is the easiest unit of analysis to follow over time, yet unless the individual is clearly contextualised such an approach runs the risk of creating isolated case studies without a clear idea of how diversity is embedded in the specificity of circumstance, relationship and setting. A focus on individuals may risk ethical problems around the invasion of privacy, and has the disadvantage of reliance on personal accounts.

With the exception of the BHPS, most quantitative longitudinal studies have taken the individual as a unit of analysis. The birth cohort studies can also be seen as sampling historical time periods, the age cohort studies as sampling particular ages/ life events. In terms of the qualitative literature, longitudinal studies have tended either to follow communities (which includes following individuals), or follow individuals over particular transitions. As yet there exist no open-ended qualitative studies that span the life course of individuals and /or families. While it would be possible to envisage and plan such a study, our consultations with researchers generated a rather different vision of what might be possible where cases were linked to sufficient social and cultural background to facilitate linkage with other studies.

Several different terms were used by contributors including the 'embedded case study', the creation of 'multiple and interplaying units of analysis' represented through 'case records', and the identification of a range of 'individual, groups and ecologies'. What emerged from the consultation was the value of a layered approach in which individuals may form the core of a longitudinal sample, but needed to be supplemented by contextual data on their wider relationships, environments and resources. This is directly related to the methods that such a study might employ.

5.3   Scale: size and duration

As part of the consultation process we invited contributors to imagine a longitudinal qualitative study, and several suggested a model of a generalist study on a comparable scale to that of

the established quantitative longitudinal studies. They suggested that it should be as large scale and long term as feasible, and would generate a data set for secondary analysis. It would be likely either to cover a small number of issues in depth or a large number of issues without great depth. The kinds of studies that emerged within this model included a qualitative version of the British Household Panel survey in which a large sample (up to 1000) would be followed up differentially from birth to death. Other suggestions included a study of 100 families over a 20-year period, and a study of children's development following a cohort of 200+ over a 20-year period. In general the value and power of a longitudinal data set increases over time. Government funders indicated to us that they were initially suspicious of making a large investment in a study such as the BHPS. Ten year later they are convinced of the value of the study and, as importantly, have learned how to make the most of the data that it produces. They now play an active part in shaping the data it may produce in the future. It is not then surprising that the idea of a large-scale generalist QLL study met with mixed feelings among those consulted. Funders could not quite imagine how such a generalist study would offer the level of detail that they might require and feared that it might replicate existing resources. Members of the research community expressed concern that the funding of such an ambitious enterprise might channel resources that would otherwise be available to alternative research.

When asked to imagine QLL studies, those we consulted more often proposed projects of a much smaller scale, which fitted with their existing research plans and which would be a development of the knowledge base in their particular fields. The scale of these studies varied enormously depending on the subject of the enquiry, the intensity of the data collection methods, the duration of the study, and the size of the sample. So for example, what may be thought of as a small sample may give rise to a very large data set with data collected at six monthly intervals (Yates 2003). In some areas of research a valuable QLL study could follow a small sample (20) over a relatively short period of time (1 year), for example studies of people moving through different phases of homelessness, and the careers of young people involved in prostitution. In other cases small samples might be followed over an extended period of enquiry, as in the example of a study of changing domestic practices, or the example of the migration practices of highly skilled workers. In a community study, data collection may take place over a 50-year period, with intense periods of data collection every five years. Most commonly contributors to our consultation argued for a duration that went beyond the normal 3-5 year funding cycles of the ESRC and other funding bodies. Those involved in qualitative research emphasised the time needed to undertake high quality and rigorous qualitative analysis, observing that more value would be yielded from qualitative studies if more time was given to primary analysis, data sharing and meta-analysis.

One of the characteristics of good qualitative research is that experienced researchers undertake data generation and analysis. This has benefits for the quality of the data, the ethical relationship between researcher and researched and the quality of the data outputs. As the scale of qualitative research increases it becomes more and more difficult to preserve these benefits. The challenge then is to find a way of scaling up from small-scale qualitative enquiries, in such as way that economies and privileges of scale are realised without losing the qualities of small-scale research. One such strategy suggested was for QLL studies to be linked to existing studies with large and representative samples, so that the QLL sample and the findings could be contextualised within a larger data set. Another strategy was for a number of teams of researchers to collaborate, possibly pooling resources in relation to data collection and archiving, and then specialise in the analysis of particular elements of the data. The practice of 'scaling up' from qualitative data sets is beginning to gain support in the UK qualitative research community following the ESRC's review of qualitative resources (Henwood

and Lang 2003) and increasing interest in ensuring that qualitative data is represented in new developments in archiving and secondary analysis. It was felt that collaboration on a major QLL study could provide an excellent vehicle for testing out the potential of linking and sharing qualitative data sets. There was a general feeling that although qualitative research does not rely on or need representative samples, a major QLL study should begin with a robust sample. Depending on the substantive focus of the study, such a sample may be constructed representatively or purposively in order to focus on specific groups, situations and/or behaviours.

5.4   Structure and organisation

The general consensus from the consultation process was that if a large study was to be funded then the best way of organising it would be on the basis of a hub/node model. Opinion differed as to how tight or loose the structure of the study might be. At one end of the scale was a highly centralised model in which a central hub subcontracts fieldwork to regional nodes; at the other end, a collaboration between a number of research teams (nodes) who undertake their own fieldwork and analysis but who come together to pool resources and activities through the operations of a hub. Researchers involved in QLL work talked about the need for a forum to network with and support one another, to share ideas about good practice and to seek support for continuing existing work. The loosest interpretation of the hub/node model could be envisaged as a resource for QLL research and a clearing-house for information about QLL resources, funding opportunities etc. Several contributors observed that the hub would need a 'steady director', core funding and a stable institutional base. Issues of ownership are complex in all longitudinal studies, and clarification would be needed as to whether the study was tied to an institution and/or an individual. Renegotiation and open discussion over time would be necessary, particularly in matters of succession.

There are dangers that a collaborative, interdisciplinary, multi-institutional model of organisation would be excessively complicated in relation to communication and the development of consistent and systematic research practice. Current ways of making such collaborative practice easier included working across disciplines rather than across institutions. The former demands good communications and shared understandings and mutual respect, but the latter requires administrative and financial parity. Geographical proximity was seen as an important factor in facilitating good collaboration, enabling informal and impromptu meetings. Regular meetings of both managers and researchers, between collaborating institutions were seen to be very important.

Essentially the nodes would take the form of a number of linked studies. In order to build on the tradition of excellence in qualitative research it is likely that nodes would be constituted and proposed through existing academic networks, and may or may not be coterminous with single academic or equivalent institutions, but it was agreed that a clear institutional home was required for the project as a whole. Contributors talked about the importance of securing long term funding and having a viable career structure in place in order to hold onto experienced and developing researchers.

It was generally recognised that such studies would combine permanent and contract staff, and would ideally combine researchers at all stages of their careers in order to encourage a creative environment that could provide training and experience for developing researchers. This would avoid the dangers of becoming top heavy with senior academics who were not involved in fieldwork and analysis. Fellowships could be attached to nodes to encourage the

development of a new generation of research leadership. It was also observed that QLL studies bring with them administrative complexity, highlighting the need for stable administrative support.

For a QLL study to work there is a need for ongoing commitment of time and contact. Several contributors spoke of the value of maintaining the same research team over time, building rapport with respondents, saving preparation time and accumulating analytic insights. Others also pointed out some of the less positive aspects of continuity of researcher including a loss of objectivity and an accumulation of a partial perspective. Several contributors indicated problems associated with longitudinal projects that are insufficiently intensive to provide full time employment for staff, while others observed the need to recognise that a longitudinal project could be a daunting prospect for researchers who have other obligations and interests in their lives. Inevitably, longitudinal studies have to deal with change in the lives of the researchers as well as the participants. This heightens the need for clear documentation of the research process, as one contributor suggests there might be 'a specific strand of work within the study itself which seeks to document the study itself, a detailed history required to maintain continuity without limiting innovation'.

Whatever the substantive focus or foci of the overall study it was felt that the hub/node model had a great deal to offer, with the hub taking the lead around shared objectives and project linkage and the nodes concentrating on the creation of high quality yet relatively small scale qualitative projects. If the study was to be genuinely longitudinal then issues of ownership, succession, continuity of staffing, and career structure would all need to be considered from the outset. To enable high quality researchers to make long-term commitments to such an endeavour long term and core funding would need to be in place supplemented with shorter term contract funding.

5.5   Funding

There was considerable interest in QLL research among the funders we consulted. Representatives of research councils explained that where a QLL methodology was relevant and appropriate they would consider funding. The independent Joseph Rowntree Foundation explained that they and other charities were becoming increasingly interested in long-term outcomes and were themselves planning to fund a QLL study of resources in later life as part of their Ladders out of Poverty programme. In general government departments, research councils and charities had existing research plans, priorities and procedures and while none excluded QLL designs it was rare to offer more than three years funding. Existing QLL studies in the UK have tended to move between three-year funding cycles, and as yet have not been included in the direct funding arrangements that characterise the National Strategy for Longitudinal Research. The research community sent a strong message that in order to get best value from qualitative research, funding cycles need to go beyond the current three-year norm.

Those with experience of negotiating multiple funding for long-term studies warned about the amount of research time that can be taken up in securing project money. Contributors also spoke about tensions between academic and sponsor agendas and the ways in which funding may slant the direction of an ongoing study. While it was recognised that there may be opportunities to access sources of funding in addition to that of the ESRC (depending on substantive focus), it was agreed that reliable core funding was necessary to make such a study possible. Contributors spoke positively about the potential to secure local funding where

a study had a local presence, and international funding if the design was duplicated in other countries.

In order to realise the enormous potential of a QLL study the costs of archiving and secondary analysis would need to be covered. Secondary analysis of qualitative data is an emergent area of research activity and one that funders are yet to fully understand and support. An important part of any QLL study would be to establish an audience for data sharing and secondary analysis, part of which is to ensure that such work receives financial support. A general concern expressed by researchers was that this initiative should not divert funds that might otherwise go to qualitative, QLL and longitudinal research. If such a study were to threaten the funding of existing and potential studies, then it would struggle to prove its value.

5.6 Applications of QLL research for policy and practice

Some researchers were doubtful about potential policy applications of a major QLLS, since policy makers require short-term research providing quick answers. But when we consulted directly with research managers in government and other funding bodies we found a different picture, including a willingness to fund QLL research to answer longitudinal questions. Research can play a broad role in relation to policy, used not simply to ascertain the effectiveness of the communication of a policy or to establish the effectiveness of a policy outcome, but also as a tool to help plan and develop new policy. For the latter it is crucial that policy makers have a good understanding of social trends, of people's values and priorities and the ways in which policy is experienced in the context of everyday lives.

Large-scale quantitative longitudinal studies receive direct support from government. Over time government researchers have learned to use these data sets, understanding their potential as a permanent policy resource to be interrogated and tailored for future enquiry. The presence of these longitudinal resources significantly changes the relationship between research and policy making that characterises one-off studies, including most qualitative research. Our consultation revealed the potential for developing an equivalent presence for a Qualitative Longitudinal study, which would act both as a resource for policy makers and help educate research users as to what this kind of data can and cannot do. As a contributor explained:

> 'QLL research produces a dynamic picture of people's experiences, identities and practices which may be at odds with the more static definitions and typologies employed by policymakers. Longitudinal research can highlight the range of factors that impact on people's lives, the particular contexts in which these happen and the changes over time. It can thus better inform policy-making'.

So what can QLL data do for policy makers? In the same way as quantitative longitudinal studies, QLL could provide an ongoing resource that could be drawn on to inform the debate of the day, such as the contemporary debates of student loans. A study of children and families could shed important light on the impact of a whole raft of new policies in the area of family life including:

> 'educational policies and practices, parenting support, preventive programmes (domestic violence, child abuse and neglect, criminality and childcare), as well as helping move forward understanding of child development, abuse, domestic violence etc.'

'A QLL study could also facilitate insight into the long-term effectiveness of policy assumptions, documenting the interchange between policies and practice over time. Moreover, it could do this from the perspective of those who lived with and through the policies rather than those who administer them. But what distinguishes QLL from both other longitudinal and qualitative studies is the way that it can help us understand how something works'.

The ultimate value of a QLL study may take many years to accrue, the tracing of historical trends over time, and of the effectiveness of policy assumptions that go beyond particular administrations. A QLL study may eventually be able to show 'how new concepts emerge in society, and how these are developed and experienced.' For a study to be viable it must deliver at all stages of its development. In the short term the applied value of a QLL study may come from comparative analysis and insights into short-term changes. In the medium term the focus could be on particular areas of policy in order to explore the complex relationship between policies, contexts and outcomes. In the longer term it may be possible to grasp a tangible sense of social change, intergenerational dynamics and the making of history. Like all qualitative research, QLL is better at explaining complex processes and situations, than producing simple 'what works' evidence. For this reason there is a growing recognition of the value of QLL data for the development of effective practice as well as effective policy.

6. RESEARCH ISSUES ARISING IN THE LITERATURE AND CONSULTATION

6.1 Ethics

Ethical issues are of considerable concern for qualitative research, and the literature review indicates that they can be amplified in importance in QLR. Major concerns are around consent, confidentiality, anonymity, the potential impact of the research on both researched and researchers (Yates and McLeod 1996), intrusion, dependency, distortion of life experience through repeated intervention, emotional involvement and problems of closure. In the case of researching children and young people, or otherwise potentially vulnerable groups, the issues once again are intensified. Saldana points out that some schools might give researchers open permission to work in their schools over a long-term period, and care needs to be taken not to abuse this generosity (Saldana 2003). One of the authors of this piece was involved in an ethnographic study in secondary schools. In one school consent to follow a particular class around for a day a week for two terms required the consent of the head teacher, and every individual teacher whose classes those children would attend during the period. On following the young people the researcher discovered that their permission had not been sought. She negotiated her presence in all activities with the group (Gordon et al. 2000). Informed consent in the context of QLLR is not a one-off event, but a process, with continuous consultation necessary throughout all phases of the research, including data analysis and final reporting (France, Bendelow and Williams 2000). In relation to confidentiality, mechanisms need to be in place to protect informants by keeping data confidential and out of the wrong hands.

Kemper and Royce highlight some specific ethical issues for anthropological longitudinal fieldwork: the implications of advocacy (via the continuum of researcher stances from observer to active partner to advocate); of distortions in the local prestige system; of intimate involvement in domestic units and their problems; and of negative effects on cultural values

(2002: xxx). Researchers' behaviour in the field in whatever discipline will have an effect on other researchers actually in the field, or planning to work there. They suggest that

> 'in some ways, ethical issues in long-term research are like the challenges of family life. The more intimate the relationships and the mutual knowledge, the greater the potential for disagreement. At the same time, such intimacy allows more opportunities and more avenues for resolving conflicts' (2002: xxx).

The research relationship inevitably becomes a focus of analytic attention within QLLR (Thomson and Holland 2003). A clear record of the research process and experience needs to be generated and visual methods might also come in here. As with most issues, QLLR intensifies what is the case for qualitative research. Ward and Henderson (2003) draw attention to some of the ethical concerns raised when tracking vulnerable or marginalised groups, in their case young people who had been in care, and had experienced dependent drug use. They realised that they had responsibility in deciding whom to follow up, taking into consideration the emotional and psychological situation of the young person, and the possibility for an interview triggering relapse into drug use (Ward and Henderson 2003).

For some researchers visual data is particularly problematic for concerns about anonymity. Saldana for example suggests that some institutions might not allow them, and that archived photographs or video recordings should be securely stored and restricted for viewing, preferably to the research team only (2002: 25). Pink (2001) and Banks (2001) put forward arguments for creating an ethical archive of visual methods. In general on the issue of representation Pink suggests that 'The visual should be seen primarily as part of how we find out about the world, and only sometimes as how we then represent this' (interview).

Questions of ethics have featured strongly in our consultation, although a number of contributors have emphasised that QLL methods may not in fact raise any ethical issues that are not also common to qualitative and longitudinal methods respectively. Rather they amplify or reframe established ethical challenges. Due care must be put into the relationship between researcher and researched and into ensuring an understanding of the consequences of involvement for all those taking part. The major ethical issues emerging from the consultation (as from the literature review) were confidentiality, privacy, informed consent and data ownership.

6.1.1   Confidentiality

Studies that collect data on the same individuals over time are likely to accumulate a unique data set that acts as 'fingerprint' identifying that individual. This is the case for both quantitative and qualitative approaches, as the former begins to take on the consequences of data linkage. The value and power of longitudinal studies increase over time, and the protection of respondent confidentiality has been an overriding principle of the management of both qualitative and quantitative longitudinal studies. Among researchers with qualitative longitudinal data sets, concerns about maintaining confidentiality have been expressed primarily in relation to the archiving of data or data sharing. Among researchers with quantitative longitudinal data sets, concerns are expressed primarily in relation to sharing their sample with other researchers on the grounds of fears of 'overburdening' individuals, but also of losing control of what happens to data, and original contracts made with participants around confidentiality.

Attitudes towards confidentiality differed according to discipline. For example, amongst anthropologists the approach was less concerned with preserving confidentiality than with balancing any exposure with sharing control of the research process and collaborating with participants to negotiate representations and findings.

6.1.2   Privacy

The format of the qualitative panel study brings with it particular dangers relating to what one contributor described in terms of 'intrusion, dependency and distortion of real life processes'. Obviously the intensity of data collection and the methods employed affect the character of the intervention that is being made into the life of the participants – what in quantitative longitudinal approaches is called 'panel conditioning'. All those with experience of using the method agreed that care had to be taken to ensure that the impact of the research was not harmful, but practice differed ranging from a partnership approach where data and interpretation were negotiated to less interventionist approaches where participants had little contact with the researchers other than at data collection points.

QLL studies need to 'ensure that questions are germane' and that the research relationship is not and does not become exploitative with the passage of time and the growth of familiarity and trust. Several contributors suggested that QLL studies need to carefully document the impact of the research process on the researcher and the interviewer, both as a way of providing vital contextual data necessary for data sharing, but also as a way of understanding the impact of the QLL methodology on those concerned. Issues of continuity of researcher where the confidentiality and anonymity of researchers may become significant were raised, particularly in the context of secondary analysis where researcher field notes become a source of public data.

6.1.3   Negotiating consent as a process

One of the features of longitudinal research is that it exposes the extent to which consent is a process rather than a single act. While this is true for social science research more generally, it is amplified by QLL. A number of commentators talked about the 'right to withdraw' from a study, noting 'the tendency for participants in a longitudinal study to be coerced and feel obliged to continue participating'. Contributors noted that there should be ongoing communication with the sample over 'changing research aims and consent to secondary analysis'. Those involved in visual research talked about a collaborative and iterative approach to the negotiation of consent and discussed the range of different points at which consent might be negotiated: the start of the study; when they see the material; and before material is submitted for publication. Whilst guidelines on informed consent proliferate, few examples of good/bad practice are in the public domain.

6.1.4   Data ownership

Issues of data ownership came up several times in different contexts during the consultation process. Studies that have taken place over long periods of time have had to deal with the challenge of 'passing the mantle' from one generation of researchers to the next, and negotiating between the ownership claims of funders and different researchers. But even in shorter studies the question of who owns the data, who has access to the sample, and who can publish from the data set, demands thought and clarification. Participants also have ownership claims over data concerning them, which differ depending on the form in which they are collected (Mauthner et al. 1998). Professional bodies provide guidelines, and in some instances

there are legal requirements, again particularly in relation to young people. But researchers must be aware of and negotiate all of these issues when considering and setting up QLLR.

The possibility of the ESRC establishing an ethics panel to advise rather than adjudicate on a range of ethical issues was raised several times during the consultation process.

6.2   Archiving and secondary analysis

The model provided by quantitative longitudinal studies is one in which the investment in creating and managing a longitudinal data set are rationalised in relation to its value as a resource for secondary analysis which increases with time and use. Archiving and data re-use from QLL studies is currently limited and the social science literature on these issues reflects this, being largely limited to single interview qualitative studies. Papers from the Murray Center, University of Harvard (James and Sorenson 2000) and the Special Collaborative Centre 186 'Status Passages and Risks in the Life Course' at the University of Bremen, Germany (Kluge and Opitz 2000) are among notable exceptions. The former discusses the efficacy of archiving longitudinal data for future research and the particular contribution of qualitative data to this enterprise but is limited in scope where the procedures and issues for archiving and re-using QLL data are concerned. The latter describes the development of a computer-aided archiving concept for qualitative longitudinal data, including strategies for anonymisation and detailed conditions for access and transmitting data[1]. There is, however, a tradition of data re-use in the field of anthropology. Whilst there is some discussion of the considerable re-use of archived material on the one hand and a reluctance amongst anthropologists to archive their own data on the other (Zeitlyn 2000), examples of making field notes and analysis available on the internet include Paul Stirling's Turkish Village Archives 1950-1996 (http://lucy.ukc.ac.uk/stirling.html)[3].   There is also a long established tradition of archiving and re-use of QLL data in the field of oral history (Sheridan 2000, Webb 1996). This has been attributed to a different approach to data from that of the social sciences (Parry and Mauthner 2004:148). Where oral history data is viewed as an end in itself, as an historical record for current and future use and, therefore, a communal resource or property, social science data is viewed as a means to an end, a potential resource for generating new hypotheses, findings and theories and, therefore, an individual resource / personal 'property'[4]. Practices to address ethical, legal and practical issues associated with archiving and data sharing are established via Oral History Society ethical guidelines, written copyright clearance etc., although problems associated with anonymity and consent have been raised (Leh 2000).

The literature on the ethical, methodological and epistemological re-use of qualitative data is growing. In the UK, a developing ESRC agenda[5] relating to data archiving, sharing and re-use, and the leading role of Qualidata in carrying this forward, has significantly contributed to this (e.g. Corti and Thompson 2003, Corti 2003a, Corti 2003b). However, three recent ESRC reports (Boddy 2004, Fielding 2003, Henwood and Lang 2003) highlighted the currently low levels of sharing and re-use of qualitative data, noted some resistance to depositing qualitative

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[1] Data are available for secondary analysis and reanalysis includes QL studies of up to five rounds.

[2] Sound and video tapes, together with photographs are not all available online and access is limited to experienced scholars.

[3] Sound and video tapes, together with photographs are not all available online and access is limited to experienced scholars.

[4] Oddly, copyright remains with the respondent in oral history and the research institution in social sciences

[5] Including a National Datasets Strategy and Coordinator, a Demonstrator Scheme in Qualitative Data Sharing and Research Archiving, the commissioning of e-Social Science Centre (NCeSS) Nodes, a number of Qualidata initiatives and the potential inclusion of qualitative elements in a Secondary Analysis Programme

data in national archives, and identified ethical, practical and methodological issues underlying this situation. The following were among the conclusions for the qualitative research of the three ESRC reports: archiving should necessarily be more selective and access more conditional; original researchers' views on the value or practicality of archiving for re-use are particularly important; issues of verification and accountability, and of replication, do not apply in the same way; qualitative data should be subsumed within general archiving policy and practice alongside quantitative data; and there should be a shift towards a 'mixed economy' of archiving, involving Qualidata and a range of other, more focused initiatives and alternative models of research archiving including local archiving, collaborative work and methodological innovation.

These reports also identified the need to develop more imaginative ways to support qualitative data sharing and research archiving and viewed new technologies, such as digital audio, video and computational techniques to represent complex data in more accessible forms, as key to this process. A Napster-type model of peer-to-peer archiving and data sharing and the application of GRID technologies to accessing dispersed, multi-modal archival material and achieving collaboratively-produced, multiple but inter-linked analyses were among possibilities considered (Fielding 2003).

Documentation of innovative practice is not extensive but includes Banks (2001) and Pink (2001) on the ethics relating to the collection and representation of visual data; approaches building on Stenhouse's idea of the 'case record' – 'a theoretically parsimonious condensation of the case data produced by selective editing without explicit comment' (Walker 2002); and the use of hypermedia in ethnography as a means of juxtaposing written, visual and oral data and linking together data, analysis and interpretation in the same medium (Mason and Dicks 1999).

However, there is also concern about the longevity of such technologies, encapsulated in a recent Guardian article:

> When monks were compiling William the Conqueror's Domesday Book in 1085, they probably didn't expect it to last 1,000 years. But they would surely have been shocked by the idea that it would be unreadable in 10 to 20 years, or even 50 years. That, sad to say, is the position most of our digital data is in today. When our descendents look back at the dawn of the "information age" in the UK, they may see a black hole. (Schofield 2003)

6.2.1 Collaboration and sharing in data analysis and dissemination

Our academic, funder and archivist contributors echoed the themes of the three ESRC reports quoted above, highlighting the currently low levels of sharing and re-use of qualitative data, noting some resistance to depositing qualitative data in national archives, and identifying ethical, practical and methodological issues underlying this situation. The Government's Chief Social Researcher clearly underlined a more general view that, in the QLL context, ethical issues, such as ownership of data and of records, the nature of informed consent, the need for separate consent for archiving and data sharing; and the extent of neutralisation required for anonymisation of data, require even closer consideration. Other complexities to be faced in the QLL context included distinguishing between primary and secondary analysis and difficulties involved in representing and disseminating QLL data.

There was a view that QLL research could deliver considerable methodological advances in facilitating multiple interpretations of the same data and a disposition towards innovation in

addressing these questions. Establishing an ESRC ethics advisory panel, and strict codes of practice accompanied by inspection were among other suggestions offered in recognition that these issues were rising on the international research agenda. Innovative ways of collaborating, creating a 'permeable membrane between studies', were also seen as key.

National archivists, in the UK and the US, underlined the relative absence of archived QLL studies – Qualidata currently holds two studies, both mixed method with a maximum of three interview rounds. Both academics and funders echoed their view that archiving methods would be essential to meet the potential of a QLL study. However, the research should not be archivally driven, but based on a partnership between archivists and researchers in developing a data management plan for the research and importantly budgeting for this. Costs for the incorporation of this element require exploration.

Discussion largely revolved around practical concerns and ideas and methods for innovation. Potential solutions to practical concerns such as where to deposit the QLL dataset were limited, although an existing archive would offer the most economical solution. The question of access provoked a variety of perspectives, with national archives restricting their use to academics and other archives and some academics extending this view of data users. The researcher specifies access to the Murray Center data archive.

What to archive was also a key theme. The Murray Center emphasised the importance of archiving even the contact details of study samples, referencing Laub and Sampson's (2003) qualitative follow up of a sub-sample from a quantitative longitudinal study of criminality. It may not be possible or appropriate to archive all data from a QLL study and selective archiving is a potential means of overcoming some of the difficulties, although this might involve loss of meaning and relevance.

There is increasing interest in applying e-science to the 'how' of data collection, sharing and archiving and dissemination. Relevant national archives are responding to this in ways that include a shift towards non-paper archiving: investigating scanning to PDF files (lasting 10 years), receiving data as text files which are then run into NuDist, the potential for translating video to DVD (as videos are 'dying'). Collaborative models of archiving that allow a greater degree of authorship for the data user are increasing in favour.

The ability of computational techniques to represent complex data in more accessible forms has given rise to an ability to move beyond describing and interpreting to showing and explaining data. Stenhouse's idea of the 'case record' as a way of using empirical data that is more open to alternative interpretations – may prove very fruitful in the QLL context.

Questions were raised about the definition of data sharing and secondary analysis. Where researchers themselves return to the raw data is this secondary analysis? The boundary between primary and secondary analysis is still blurred. The quantitative longitudinal experience suggests that there are distinct disciplinary agendas for secondary analysis and that factors facilitating interdisciplinary working include: a pre-existing network of researchers with experience of working across disciplines; parity of status; shared understanding of key concepts and ways of working forged during initial proposal stage, and geographical proximity. Other suggested practical measures for encouraging collaboration included: sufficient core funding and formal agreement making all data freely available to all collaborators; cross centre steering groups working on different core themes but collaborating at all stages; inviting

analytical contributions to the study early on; and establishing a core team specialising in the secondary analysis of QLL datasets.

Considerable reliance is currently being placed on new media as a means of encouraging collaboration (e.g. the GRID technologies described in Fielding 2003). But qualitative researchers were more concerned with the need for funding to enable them to return to their own data, to enable the bringing together of a number of small studies to 'scale up' (meta-analysis), and to enable multi-disciplinary collaboration between research teams on secondary analysis of data on specific issues. Maintenance of some control by the original researcher(s) and a model of trust and collaboration rather than competition were considered key requisites for such initiatives.

Speaking from the experience of conducting secondary analysis of qualitative data, some academics described models that included: revisiting a dataset collected by a team from a different discipline and theoretical perspective; collaboration between different research teams in choosing particular points for more hands-on joint analysis and sharing data that is relevant to this undertaking; sharing data via short papers on key area of policy relevance (rather than sharing transcripts); and commissioning re-interrogation of a dataset for a particular policy concern.

6.3   Developing QLLR methodology

Methodology in social research entails: a social and political process of knowledge production; assumptions about the nature and meanings of ideas, experience and social reality and how these might be connected; critical reflection on what authority can be claimed for the knowledge that results; accountability (or denial of such) for the political and ethical implications of knowledge production (Ramazanoglu with Holland 2002:11). Qualitative longitudinal studies are used in a wide range of social sciences and draw on different theoretical, and so methodological, perspectives in their design and implementation. At the core are the principles of qualitative investigation in general, an interest in understanding the meaning of the experiences of social actors in their social context, both for the actors, and through an analytic and interpretative process for the researcher. Qualitative research can reach the areas that quantitative research cannot reach, producing high quality, in-depth data, and providing great explanatory value. It can offer a realistic understanding of causality, how and why things happen as they do, how aspects of social, cultural and contextual processes interact to produce different individual outcomes (Molloy and Ritchie 2000, Thomson, Henderson and Holland 2003). Qualitative research is generative of theory, although it can also be used to investigate hypotheses, in contrast to quantitative research usually designed to test theory. And qualitative longitudinal research brings the additional dimension of time, process and change to the centre of the process (Pettigrew 1995).

6.3.1   Methods in QLLR

The types of methods used to generate data in qualitative longitudinal research, again are those of qualitative research in general, but often combined with some methods associated with quantitative designs (for example surveys of varying sizes and types, social mapping of geographical areas). They also vary with discipline. The basic method in anthropology for example, although it is now widely used in other disciplines, is ethnography, itself constructed from multiple qualitative methods, but critically involving social exploration and protracted investigation, and interpretation of local and situated cultures grounded in attention to the

singular and concrete (Atkinson and Hammersley 1994, Atkinson et al. 2001). Saldana (2003: 18) points out the importance when starting a qualitative longitudinal study of gathering baseline or core data 'essential demographics, particular categories, or other descriptive qualitative data for future reference, implied by the research questions or areas of interest that launch the study, to assess any future change'.

In general the methods used in QLR will depend on the research questions, the substantive research area and the perspective of the researcher/discipline. Amongst those used are interviews (individual (including life-history and biographical), group, semi-structured, depth, informal etc.), case studies, observation, participant observation, documents of various types including diaries kept specifically for the research (written, audio-, video-, photo-diaries etc.), instruments (for example psychological tests or other standard instruments), and visual, play and drawing methods, for example with children. Similar considerations about research questions and substantive area will apply to the other issues relevant in research design: the nature of the sample to be selected, the unit of analysis for the research (individual, community, organisation, institution, time period, spatial or geographical entities) the overall timeframe of the study (including time intervals if relevant). If a long timeframe is envisaged (prospective longitudinal design) plans must be laid for archiving and information retrieval by both original researchers and those who might follow them, including secondary analysts (Foster et al. 1979b). Some methods gain popularity in the context of particular topics, for example biographical interviews in the study of young people, and transitions in general are currently popular, or academic fashion, for example visual methods are currently fashionable although they have existed since our ancestors discovered the cave wall. (But for their more recent roots see Bateson and Mead 1942, Hagaman 1995.)

6.3.2   The value of flexibility

A major value of QLR is flexibility, with the potential for development and innovation to take place throughout the entire research process. This flexibility can extend to sampling, methods, units of analysis, and theorisation. Sampling in qualitative research follows a theoretical, rather than a statistical logic and so is characteristically purposively and conceptually driven. There is less concern for 'representativeness', and sample and sampling can change in the process of the research, even more so in the longer term QLLS. Two major approaches then are purposive and theoretical sampling. In the first, cases are chosen because they illustrate some feature or process in which the researcher is interested; in the second samples are selected on the basis of their relevance to the research questions and theoretical position of the researcher, characteristics or criteria which help to develop and test the theory and explanation underlying the work are built into the sample. Sampling techniques within this framework include 'extreme or deviant cases', maximising the factors of interest; intensity sampling, selecting experts on particular experiences; maximum variety sampling, selecting a heterogeneous sample and observing commonalities in experience; and critical case sampling, choosing examples significant for the identification of critical incidents that may be generalised to other situations. In the course of ongoing analysis purposively chosen confirming or negative cases can be used to enrich the data (Patton 1990, Morse 1994, Mason 1996).

In qualitative research one might adjust interviews or even the focus of the study as it proceeds. For QLLR this is even more apparent and valuable, although bearing in mind base data and comparability as far as it is required by the design (for example in evaluative policy research). Saldana, as noted earlier, suggests that we should be sufficiently flexible to be prepared to change our definitions of even our basic concepts, such as change, in the process

of qualitative longitudinal research. QLLR is also a space for both methodological innovation and experimentation with methods. For example, with technological development, types of visual data (photography, video and hypermedia) are becoming increasingly popular in qualitative research in general, as in QLR (Qualitative Sociology 1997, Pink 2004a, b). Changing technology is also enhancing different ways of storing, accessing and representing data.

Once again and perhaps inevitably, our consultation raised similar issues to those found in the literature review.   However, somewhat to our surprise we found that representatives of government research were very positive about such a study drawing on a wide range of qualitative methods including making the most of new technologies and visual, sound as well as written media. In some respects the research community was rather more circumspect, with several contributors warning against the danger of 'doing too much not well enough'. Those with considerable experience of QLL research talked in terms of the need to be 'consistent and systematic in what is gathered over the years' while also being open to new technological opportunities for data collection, but perhaps more significantly for data display and representation.

For many contributors, individual life history interviews would comprise 'the backbone' of such a study. Contributors also observed that all QLL studies will have an element of ethnography to them, and that as a methodology ethnography is inherently temporal. Contributors talked about a wide range of qualitative tools including (reconvened) focus groups, observation, diaries (both written, video and 'memory books' (Thomson and Holland 2005), lifelines, and self-mapping. Visual methods were discussed as a strategy for primary data collection, as ways of streamlining other data (for example videotaping someone talking through the contents of a memory book, or reflecting on lifelines completed previously) and as a means of documenting the research process. Several contributors spoke of the value of combining qualitative with survey methods as well as the importance of the creation of robust and extensive baseline data.

Clearly the methods chosen for such a study would be dictated by the phenomena under investigation and the specific research questions for the study. Experience of previous research suggests that given the speed with which tools for data analysis and storage are changing that data should be stored in the rawest condition possible and the method of storage should not depend on media that are likely to become obsolete.

6.3.3   Analytic strategies and comparison

The analysis of qualitative longitudinal data will depend on the research topic and questions, the theoretical and methodological stance, and the specific methods employed in the study. Saldana highlights colourfully the problems of analysis for the qualitative researcher:

> The challenge for qualitative researchers is to rigorously analyze and interpret primarily language-based data records to describe credibly, vividly, and persuasively for readers through appropriate narrative the processes of participant change through time. This entails the sophisticated transformation and integration of observed human interactions in their multiple social contexts into temporal patterns or structures. There is no result-oriented qualitative equivalent to computer software programs for statistical analysis. Hence, the qualitative researcher is not only the data collecting 'instrument', he or she is also the 'word cruncher'. (Saldana 2002: 46)

The three critical elements which QLLS brings to the dance are time, process and change, and it is equally critical that analysis can engage with and capture these elements. Wolcott (1994) suggests three stages of increasing abstraction for the analytic process: description, analysis, and interpretation. For QLLS, description involves recording, chronicling and describing what kinds of change occur, in whom or what, at what time and in what context. After 'the identification of essential features and the systematic interrelationships among them' (Wolcott 1994: 12) analysis, an explanation of how and why the changes might have occurred, is the next stage. 'Explaining the nature and meaning of those changes, or developing a theory with transferability of the study's findings to other contexts, is the final stage of interpretation' (Saldana 2002: 63).

Saldana provides a guidebook for QLLS, drawing on his own and other studies, and he writes extensively about analysis. He provides framing, descriptive, and analytic and interpretive questions to guide the analytic process. 'Framing questions' (63) address and manage the contexts of the particular study's data, locating them in the process' (e.g. What contextual and intervening conditions appear to influence and affect participant changes through time?) Descriptive questions generate descriptive information to help answer the framing questions and the more complex analytic and interpretive questions (e.g. What increases or emerges through time? What kinds of surges or epiphanies occur through time?). Analytic and interpretive questions integrate the descriptive information to guide the researcher to richer levels of analysis and interpretation (e.g. Which changes interrelate through time? What is the through-line of the study?).

Much of our understanding of social science methodology is based on cross sectional approaches to data. A longitudinal data set complicates this, and effectively triples the analytic burden by demanding cross sectional analysis, longitudinal analysis and an articulation of the two. In a qualitative study of youth transitions, cross-sectional analysis captures a moment in time in the life of the sample (at each interview or data generation point), with the data coded descriptively and conceptually (in this example using NUD.IST) enabling comparison across the sample on the basis of a range of factors, e.g. age, gender, social class, location etc. These analyses then form a repeat cross sectional study on the same sample and analyses can be compared for change. The longitudinal analysis consists of narrative analyses of each case over the course of the study, following individual trajectories, and identifying critical moments and change (Thomson and Holland 2003). Where the study is drawing on a range of data sources analysis must also be cross cutting. QLL studies produce complex and multi-dimensional data sets, which in turn demand innovative strategies for data analysis and display.

Several contributors emphasised the need to develop clear strategies for longitudinal analysis, which in the first instance demands comparison between time periods and a focus on questions concerning continuity and change. Such analyses can be approached in a number of ways. On one hand it is possible to begin with the case, and to build up a longitudinal case study, the scale of which will differ depending on the unit of analysis and the level of detail. From these empirically based case studies a second level of generality may be developed, based on the identification of typologies of change/pathways/strategies and/or interrogation using theoretically driven analytic categories. The outcome may then form the basis of further comparison.

Another approach is to begin with outcomes and to work backwards towards explanations and/or understanding. Several contributors referred to the work of Pawson and Tilley (1997) on 'Realistic Evaluation' in this context, in which the classic evaluation mantra of 'what works' is shifted to asking 'how something works' - identifying the contexts and mechanisms that make an outcome possible. From this perspective it may be possible to begin from particular outcomes (such as for example dropping out of education) and to explore why this outcome occurred for different people in different contexts.

Any QLL studies undertake extensive cross sectional analysis at each wave of data collection which is then combined with the specifically longitudinal analysis that takes several waves of data collection to begin to take shape. Depending on the constitution of the sample such cross sectional analyses may be more or less useful and our consultations established a consensus as to the value of employing a robust sample that could be linked to quantitative databases. Yet when it comes to exploring differences within the sample, several contributors preferred to talk in terms of cross cultural approaches, which recognise that direct 'comparison would be difficult but a focus on developments and changes differ between different contexts should be feasible' (questionnaire response).

A large (and possibly multi-site) QLL study would give rise to a complex data set that could be analysed in a range of ways along various axes of difference. It is vital that sufficient capacity is built into such a study to ensure that a full analysis is undertaken, whether that is primary and/or secondary. One way in which the analytic functions of the study could be organised is in relation to the hub/node structure. Primary responsibility for longitudinal (narrative) analysis might be undertaken by the nodes, while the hub might facilitate analysis that cuts across the sample, but carried out across nodes. If nodes also represented localities, cross-cultural analysis might be undertaken between nodes. However analysis was to be organised, any study would have to develop clear plans which factored in the time that analysis would take and the different dimensions of such analysis.

Several contributors made practical suggestions to facilitate comparability and enable linkage between studies and / or nodes. These include the use of a flexible common core coding frame, the use of compatible software. The key to comparability over time and between studies/ nodes in part depends on the use of common data collection tools and reproducable modes of analysis. Yet while there are obvious attractions in standardising methods of analysis, contributors also commented on the exciting potential of bringing a range of analytic frameworks and analysts to bear on the same data. So for example a single longitudinal case study could be analysed from a range of theoretical and disciplinary perspectives and the outcomes compared. This might be designed into the QLL study from the outset (as part of the function of multi-disciplinary teams), or could come about as a result of data sharing.

6.3.4   Methodological approaches in QLLR

A range of methodological approaches or models for undertaking QLR appear in the literature including: repeat cross-sectional, integrated mixed method, prospective longitudinal, mixed method longitudinal with a one-off qualitative element, prospective quantitative and retrospective life history, quantitative longitudinal study with planned qualitative component, qualitative retrospective and prospective, and other combinations. The dominant models emerging from this review appear to be:

1. Mixed method approaches, where qualitative longitudinal elements are attached to a quantitative study. This can vary from a fully integrated quantitative/qualitative approach and design to a small qualitative 'add on' to a quantitative study.

2. Planned prospective, qualitative longitudinal studies. These can be divided into studies where the unit of analysis is the individual, and those where the unit of analysis is something other than the individual, for example the family, community, setting, or organisation.

3. Follow-up studies, where initial samples or sub-samples have been followed up after a period of time has elapsed. These can be associated with the scholarship of individuals, where samples are revisited over the course of an academic career, or as we have seen research teams, with changing personnel returning over a period of time to a sample or location.

4. Evaluation/ tracking studies. Longitudinal qualitative methods are becoming an increasingly popular approach for policy evaluation.

6.3.5   Theory in QLLR

When asked to reflect on the place of theory within a QL study, contributors to the consultation process suggested the need for a balance between theoretical purposefulness and openness and between deductive and inductive approaches. As with all of our questions, it would be necessary to define the substantive focus of the research and specify research questions in order to identify what theory might be relevant and how it might be employed. Nevertheless several contributors observed that a QL study would demand a theorisation of temporal processes, pointing to a range of relevant theoretical literatures that have emerged in different disciplines and which increasingly straddle disciplines. Key areas include an exploration of the interplay of individual and social 'developmental' processes with historical and cultural continuity and change.

Several contributors asserted that all studies start with theoretical assumptions, and that these should be made explicit. Yet a QLL study would have room for a range of theoretical explorations and applications, and it would be important to bring new theoretical perspectives into dialogue with the data over time. Theory would be needed at different levels, to be tested but also to be employed as tools with which to work with data. Contributors talked about establishing 'a dialogue between theory and the empirical', observing that theory should be 'included in design but analysis needs to be grounded and open', with 'each round of data collection focussed around specific theoretical concerns'. So the value of flexibility in QLLR extends to the use of theory. Contributors also recognised the centrality of theoretical assumptions in designing an archive, the structure of which would privilege particular perspectives and possibly obscure others.

There was a view amongst contributors (also reflected in the literature, for example Plumridge and Thomson 2003, McLeod 2003) that a QLL methodology may itself challenge or expose the static character of existing theoretical frameworks, and that in this way QLL may in fact represent a theoretical orientation as much as a methodology (Neale and Flowerdew 2003). Several contributors observed that the structure of a QLL study made it possible to employ an iterative and reflexive approach through which theoretical interpretations could be revisited in subsequent interviews and fed back to participants. Ideally a QLL study would be conducted in

collaboration with social theorists. Our consultation process identified considerable excitement concerning the potential of QLL research to give rise to new theoretical development, particularly in four key areas:

- theorising the dynamic, processual dimension of human life;
- revisioning the relationship between individual, social, generational and historical change
- facilitating understanding of the articulation of agency and social structure/ ecology through psychosocial processes;
- developing the theorisation of social and geographical mobility, including migration, transnationalism.

6.3.6   Innovation in QLLR

In all longitudinal studies there is a tension between innovation and comparability. How this tension is handled will depend largely on the kind of data that is generated and the extent to which existing methods and tools continue to serve the function for which they were designed. In quantitative longitudinal research innovation becomes more difficult as a study progresses, although it may be necessary as old questions and measure become obsolete. In contrast to quantitative approaches where consistent measurement is at a premium, qualitative longitudinal studies must respond to innovation in the field, and digest these changes in an iterative process informing the next stage of data collection. This does not necessarily mean that the methods of data collection will change radically between rounds, but each stage will be 'tailored' to changing circumstances in the light of accumulating findings.

The greatest danger of a major qualitative longitudinal study is that it becomes an 'albatross', constrained by the weight of its research design and a burden on those responsible for keeping it moving. In order for a QLL study to remain creative and productive it is vital that new ideas, theories and methodologies are drawn into it. One way of ensuring this process is through nurturing new researchers and encouraging the creation of a flexible data set and a culture of experimentation and responsiveness. Again this points to a model of research in which a core sample might be elaborated or contextualised within a wide variety of data sources, making the most of and testing out research applications for new technologies in the context of a commitment to data archiving and data sharing. In this way a QLL study could act as an important site of training, and theoretical and methodological development as well as giving rise to important research findings and providing a resource for secondary analysis.

From our consultation with funders we identified significant support for an initiative that was imaginative and innovative and which realised some of the investment that the ESRC has been making into methodological development within UK social science. Moreover, the notion of a data set that was collaboratively generated, accessible and interactive was welcomed, harnessing the power of new technologies for the purpose of dissemination and representation to audiences beyond the UK research community.

7.   CONCLUSION

On the basis of the range of sources drawn upon in this report, we have identified a number of requirements for the further development and use of qualitative longitudinal research in the social sciences, which could be supported by the ESRC, in the same way that they support quantitative longitudinal studies, and taken up by qualitative longitudinal researchers. There is

a need for the further development of qualitative led perspectives on longitudinal research. This study has indicated the breadth of work using qualitative longitudinal methodology that is already available and ongoing, and this must be drawn on, developed and extended, including the communication of existing good practice. There is a current debate about secondary analysis and archiving of qualitative data, and there is increasing support for this process and interest in developing methods of producing data sets suitable for deposit and secondary analysis. We need to build on the strengths of both qualitative and longitudinal research so as to optimise the quality of small-scale research, including scaling up and meta-analysis as well as the economies and privileges of a large scale data set. We have outlined many of the ethical issues raised by this type of research, and models of good practice need to be developed in this area. Finally, funding is clearly important, and it is important that research is adequately resourced, with an appropriate time frame, ensuring sufficient time, security and support to realise the potential of qualitative longitudinal research.

POSTSCRIPT (November 2006)

The ESRC has continued to pursue the strategy outlined above in relation to longitudinal research, and secondary analysis. The aims of the Demonstrator Scheme for Qualitative Archiving and Data Sharing (QUADS, http://quads.esds.ac.uk) meet many of the requirements suggested here. It is part of the ESRC's initiative to increase the UK resource of highly skilled researchers and fully exploit the distinctive potential offered by qualitative research and data. The main aim is to develop innovative methodological approaches to, and new models for the archiving, sharing, re-use and secondary analysis of qualitative research and data, and to disseminate good practice in these areas. One of the five projects is producing a showcase archive of a qualitative longitudinal study, particularly in relation to ethical aspects of archiving a range of longitudinal qualitative data, including biographical interviews (Henderson, Holland and Thomson 2006) and all projects will be reporting in the next few months (early 2007).

The ESRC is also funding a large-scale qualitative longitudinal study Timescapes: Changing relationships and identities through the life course. Commencing in February 2007, the five-year study will explore the changing nature of personal and family relationships and identities through the life course, and from different generational perspectives. The study will shed light on the links between three timescapes: biographical time, generational time and historical time and will generate data of relevance for policy, particularly in the areas of well being and the long term resourcing and sustainability of families. It will be carried out by a consortium of researchers from five universities (Leeds, South Bank, Open, Edinburgh, Cardiff) and from different disciplines (Sociology, Psychology, Social Policy, Health studies, Childhood and Youth studies, Gerontology, Oral History and Cultural Studies).[6]

Seven empirical projects will track individuals' or inter-generational groups over time. Two of these focus on children and youth – how young people work out their significant relationships over time. Three projects focus on the mid life experiences of parents and their children, exploring the dynamics of motherhood, fatherhood and work life balance across the generations. The final two projects are concerned with the life experiences of grandparents and the oldest generation, focusing on how changing relationships and identities are implicated in

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[6] The Timescapes Consortium: Director: Dr. Bren Neale (Leeds); Co-Director: Professor Janet Holland (London South Bank); Prof. Kathryn Backett Milburn (Edinburgh); Prof. Joanna Bornat (Open); Prof. Ros Edwards (London South Bank); Dr. N. Emmel (Leeds); Sheila Henderson (LondonSouth Bank); Dr. Karen Henwood (Cardiff); Dr. Kahryn Hughes (Leeds); Dr. Sarah Irwin (Leeds); Prof. Rachel Thomson (Open).

sustaining health and well being in later life. Four of the projects build on earlier ESRC funded projects, extending the longitudinal reach of the study.

The empirical projects will generate a wealth of qualitative longitudinal data, which will be gathered together to establish the Timescapes Archive, a digital resource based at the University of Leeds. The archive is designed as a specialist satellite of ESDS Qualidata, offering an innovative, devolved model for the archiving and re-use of qualitative longitudinal data. The team will be using varied strategies to build up a community of users for the resource, e.g. encouraging affiliated and secondary analysis projects. This is the first large scale, qualitatively led, longitudinal study in the UK and as such the team will be working to ensure that the study forms an integral part of the UK National Strategy for Longitudinal Studies (Elliott, Holland and Thomson 2007).

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APPENDIX

GUIDING QUESTIONS AND INSTRUMENTS

Janet Holland, Rachel Thomson and Sheila Henderson (2004)

Questions Guiding the Study

The questions raised in the specification for the Feasibility Study will guide each stage of the investigation, as outlined here. In brief the main questions are:

What would be the scientific value and value-added of a qualitative longitudinal study and would it provide a distinctive form of knowledge and understanding? What would be the complementarity with existing resources?

What should be the substantive focus, scope, range coverage, themes and aims?

On what scale and with what time-frame should the study be planned?

What should be the structure and organisation of the study?

What methodology should be employed, and how can innovative methods and technological and theoretical development be structured in over time?

What approach should there be to questions of collaboration and sharing in data generation, analysis and dissemination?

How will the sample be constructed, and what will be the issues related to generalisability and representativeness raised?

How would analytical comparisons be made possible, for example over time, between contexts, etc.?

Email questionnaire 1

QUALITATIVE LONGITUDINAL RESEARCH
ARE YOU INTERESTED?

The ESRC has commissioned a Feasibility Study for a possible qualitative longitudinal investigation. (Janet Holland, Rachel Thomson and Sheila Henderson located at London South Bank University are undertaking the Feasibility Study.)

In order to provide the case for a qualitative longitudinal investigation we are canvassing the views of a selection of researchers from the social sciences and related disciplines, and research users drawn from the public, private and voluntary sectors. This is an important piece of work that will lead to the specification for a possible qualitative longitudinal investigation. By answering the brief set of questions below you can express an interest in the project, and perhaps take part in further consultations.
1.   Are you/have you ever been involved in a study that is/was Qualitative and Longitudinal, or included aspects of this type of method?
        If yes can you give a brief description of the study(ies) and references to any published material
2.   Are you aware of other national or international Qualitative Longitudinal studies?
        If yes, can you give us names of whom we should contact about this research, and the nature of the research.
3.   Would you be open to be consulted further about the potential for Qualitative Longitudinal investigation as part of the Feasibility Study?

If yes, could you please give contact details:
Name:
What,if anything, is your Academic Discipline:
Institution:
Address:
Tel:
Email:

Email questionnaire 2

Feasibility study for a possible qualitative longitudinal study

Dear Colleague,

We are writing to you now because you have expressed an interest and/or have significant experience using a qualitative longitudinal approach. The Economic and Social Research Council has commissioned us to explore the feasibility of funding a qualitative longitudinal study. They have encouraged us to think of qualitative longitudinal research as using a range of methods (visual, ethnographic, documentary, diaries, interviews etc), as multi-disciplinary, collaborative and resulting in an archivable data that would be an important resource for secondary analysis. At this point the substantive focus and the scale of such a study are undefined. Our brief is to produce a specification involving costed models.

We want to ensure that the models that we develop reflect the interest and the concerns of the research community. In the following questionnaire we detail some of the questions that we will address in developing the specification. We would welcome your input at this stage. We realise the demands that we are making here, but it is an opportunity to shape any future agenda in this area. You may want to answer in relation to a piece of research that you would like to develop or propose in the future. You may also want to answer the questions on the basis of your own experience of using longitudinal and qualitative methods. We would welcome both kinds of responses.

1.   For what substantive areas might a qualitative longitudinal study be useful?
2.   For what kinds of research issues would a study of this kind be useful?
3.   What are the implications of using a particular unit of analysis for such a study? For example the individual, family, community, organisation, setting, event/time period, etc.
4.   In the light of the unit of analysis, what are the ethical issues involved in this kind of study?
5.   What kind of scale, both in terms of sample size and duration would be appropriate and feasible in order to address these research issues?
6.   How might a study like this be structured and organised, both institutionally and in terms of personnel?
7.   How could theory be introduced and developed in this kind of study?
8.   What methods are likely to be most relevant and effective in a longitudinal context?
9.   What are the possibilities for innovation within a longitudinal study.
10. How would analytical comparisons be made possible, for example over time, between contexts?
11. What approach should there be to questions of collaboration and sharing in data generation, analysis and dissemination?
12. What other funding sources might there be for this kind of research?
13. What are the key policy applications for this kind of research?
14. Any other comments?
15. Would you and/or colleagues be interested in bidding for a qualitative longitudinal study?

Thank you very much for your valued input.