In for the Long Haul:
Conducting Qualitative Longitudinal Research on Leaders’ Knowledge

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Abstract

Purpose – The aim of this paper is to highlight the challenges involved in conducting qualitative longitudinal research (QLR) using multiple cases of individual leaders.

Design/methodology/approach – The research design issues that form the core of this paper are based on the author’s personal experience of and reflections on conducting qualitative longitudinal research.

Findings – The paper presents a comprehensive account of four challenges inherent in conducting QLR: grappling with time; managing and analysing a complex data set; understanding the researcher-participant relationship; and recognising the ‘longitudinal effect’ on the researcher.

Theoretical implications - While much leadership research is conducted through a qualitative lens, studies that provide personal, reflexive accounts of the reality of doing qualitative longitudinal research on leadership are relatively rare. This paper will add to the paucity of what is known about conducting QLR, focusing as it does on the challenges involved in the actual process.

Practical implications – This paper aims to provide experienced academics and novice researchers alike with practical insights into the actual ‘doing’ of QLR.

Research limitations – The retrospective nature of this research does not allow for the ethnographic immersion that is a feature of ‘real-time’ longitudinal approaches (Van Maanen, 1988). However, limiting interaction with research participants to just two occasions diminishes the propensity for bias that may result from over-involvement and undue influence.

Originality/value – The extended timeframe afforded to the data collection phase is a unique aspect of this study. As a ‘prospective’ longitudinal study that involved repeated data collection from the same subjects over a period of time (Hassett and Paavilainen-Määttymäki, 2013), at least ten years lapsed between the first and second-round interviews. Longitudinal studies of this duration are relatively rare in view of the associated time commitment involved (Day and Sin, 2011).

Keywords Qualitative Longitudinal Research, Time, Change, Process, Leadership

Paper type Research Method
Introduction

This paper presents the author’s experiences of and reflections on conducting qualitative longitudinal research on leadership. Its primary purpose is to provide a more intimate knowledge of this method for researchers intent on following a similar path. In doing so, it addresses a number of perceived gaps in the leadership and research methods literatures. Firstly, while longitudinal studies are commonplace in the social sciences, very little research on leadership utilises longitudinal data (Riggio and Mumford, 2011). This absence of longitudinal approaches is even more apparent in the context of qualitative studies of leadership (Day and Sin, 2011). Secondly, while the research methodology literature presents ample guidelines for conducting qualitative research longitudinally (Farrall, 2006; Holland, 2007; Holland, Thomson and Henderson, 2006; Saldana, 2003), personal, reflexive accounts that document the reality of following these are in short supply (Hassettt and Paavilainen-Mäntymäki, 2013)

At a general level, this paper provides an overview of some of the key elements that need to be considered during the tasks of research design, data collection and data analysis. However, space precludes the possibility of doing justice to all of the pertinent issues that could be discussed under these headings. Within this wider context therefore, four central challenges confronted by the researcher have been selected for more detailed attention: These comprise of: grappling with time, managing and analysing a complex data set; understanding the researcher-participant relationship; and recognising the ‘longitudinal effect’ on the researcher.

The paper is structured as follows. First, a theoretical overview of the qualitative longitudinal research (QLR) method is provided. Second, the research design and
methodology of the study that provides the empirical evidence for this paper is presented. Third, the author’s reflections on doing QLR are discussed under the four headings introduced earlier: grappling with time, managing and analysing a complex data set; understanding the researcher-participant relationship; and recognising the ‘longitudinal effect’ on the researcher. Finally, this paper considers the implications of this learning in terms of the practice of ‘doing’ qualitative longitudinal research.

**Qualitative Longitudinal Research (QLR)**

In the field of longitudinal research, many unresolved issues remain. Chief amongst these are questions such as: ‘What is truly considered as longitudinal research?’ ‘How is time conceptualised in a longitudinal study?’ ‘How long is long enough in a longitudinal study?’ and ‘What differentiates longitudinal and processual research?’ (Hassett and Paavilainen-Mäntymäki, 2013). This section briefly considers each of these questions as they are addressed in the extant literature.

### What is truly considered as longitudinal research?

Defining the longitudinal research approach is a difficult task as the research design may vary from one study to the next. Saldana (2003) identifies the three foundational principles of qualitative longitudinal research as: time, change and process: in essence, QLR explore changes which occur over time and the processes associated with these. Menard (2008) provides a similar conceptualisation: “In longitudinal research, data are collected on one or more variables for two or more time periods, thus allowing at least measurement of change and possibly explanations of that change” (Menard, 2008:3). The two most commonly used longitudinal research designs are: repeated cross-
sectional studies (or cross-sequential studies), that involve returning to a different or entirely new sample at regular or irregular intervals; or prospective studies that involve repeated data collection with the same sample after a lengthy interval. Both these approaches offer the opportunity for ‘retrospective’ research, where respondents are asked to remember and reconstruct events related to their own ‘life-course’, or ‘real-time’ immersion, where the researcher spends a considerable amount of time, sometimes years, at the research site. Real-time longitudinal studies are closer to true ethnographic participant observation and for this reason they sacrifice efficiency for the richness of data generated (Van Maanen, 1988).

While longitudinal research designs can assume different formats, the qualifier in terms of what is truly considered longitudinal is the approach to data analysis (Tarris, 2000:1). To be considered longitudinal, the approach to data analysis must engage with and capture the three foundational elements alluded to earlier: time, change and process.

*How is time conceptualised in a longitudinal study?*

Time is central to any longitudinal study, yet, as time itself can be captured in many ways, the underlying question “What is time? can give rise to various answers. The notion of time in temporal research has been extensively examined. For the purpose of this paper, the review of Ancona et al (2001a; 2001b) provide a comprehensive overview of the different conceptions of time that exist. In line with other researchers, they distinguish between two broad categories of time: objective time and subjective time.
Objective time or ‘clock time’ is the conception of time that has evolved through history and the most common way of describing time in Western society. Objective time, also known as ‘absolute time’ relates to the actual passage of time in a linear fashion (Shipp et al., 2009). This idea of time often forms the basis of studies of efficiency wherein time is a resource that can be measured, standardised, used, bought and sold; hence the label ‘economicity of time’.

An increasing number of researchers are arguing that ‘clock time’ needs to be supplemented with a more relativistic view of time, often referred to as subjective time. Subjective time can take many forms such as: ‘cyclical time’ (in which occurrences such as the seasons, or college semesters repeat over and over again); ‘event time’, in which time is measured in terms of ‘critical incidents’ or significant events (Flanagan, 1962), that are predictable (Christmas occurs on the same day each year), or unpredictable (acts of god, nature or terrorism or nature); or ‘time as a life-cycle’. The conceptualisation of time as a ‘life-cycle’ suggests that many phenomena follow predictable trajectories or developmental patterns; for example, in human life, the ‘normal’ progression from childhood to adolescence to adulthood and old age. This notion of time has easily transferred into organisational life where the concept of the organisation’s life cycle (Quinn and Cameron, 1983), the industry life-cycle (Porter, 1980, McGahern, 2004) and the product life cycle (Vernon, 1967) are generic concepts.

In identifying differing conceptualisations of time, researchers also describe how different social groups create or culturally construct different types of time that become accepted and shared. This is a ‘socially constructed’ view of time that is related to
numerous variables such as: geography, culture and related social norms, industry and organisational contexts and professional ranks. For example, the time frame of the working day can vary across cultures, while time horizons (such as short-term, medium or long-term), can vary by profession, rank or seniority, organisation, industry or sector. In subjective and socially constructed views of time, the past can be recollected, the present perceived and the future anticipated (Shipp, Edwards and Lambert, 2009).

*How long is long enough in a longitudinal study?*

There are mixed opinions on the optimum time interval that should exist between the different phases of a longitudinal study; some suggest at least one year (Young et al., 1991) while others, who follow the life-course tradition recommend researching across several generations (Heinz and Kruger, 2001). Saldana (2003) is definite that longitudinal means a lonnnnnnnnnnng time.

*What differentiates longitudinal research from processual research?*

While longitudinal research and process research have a number of common characteristics, in the research methodologies literature, they are considered distinct approaches. The literature suggests process research can be defined in three ways: as a dynamic, “a sequence of individual or collective events, actions and activities, unfolding over time in a context” (Pettigrew, 1997: 338); as the causal relationship between independent and dependant variables; or the sequence of events that explain how things change over time (Van de Ven, 1992). The similarities with longitudinal research are evident from these descriptions, both approaches examine how things evolve over time and why they evolve in this way (Langley, 1999). The distinction is
one of content; while processual research examines how a process changes, for example, transition into a leadership role, in longitudinal research participants are asked to provide information on a number of different variables such as behaviours, attitudes and motivations.

**Design/Methodology/Approach**

The insights reported upon here are based on a research project that evolved from an exploratory study that examined the content and process of leaders’ personal knowledge, into a longitudinal study that sought to examine how these variables had changed over time. The idea of adding a longitudinal element to the research emerged ten years after the original 1997 study. In the midst of the ever burgeoning knowledge economy (Uhl-Bien, Marion, McKelvey, 2007) and the demise of the so-called Irish Celtic Tiger\(^1\) or economic boom, the environment within which Irish leaders were operating was rapidly changing. Whether or not these leaders’ personal knowledge had changed over the time interval; and if so, why these changes had occurred, appeared as worthwhile research questions.

The original research sample was purposeful, criterion based and convenient (Lincoln and Guba, 1985; Patton, 2002). Cases for study were selected because they were considered to be information rich and illuminative of the issues considered central to the research purpose; not for their ability in terms of empirical generalisation, hence the term ‘purposeful’. The chief criteria for selection were: that each participant occupied the most senior leadership role within their organisation; that they occupied this role for

\(^1\) The Celtic Tiger was the term used to describe the period of rapid economic growth that occurred in Ireland between 1995-2007.
a period of at least three years; and that they added to the research sample in terms of being representative of a broad spectrum of industries/organisational types. The second criteria, relating to the parameters of leadership experience, was included to ensure that participants had spent sufficient time in their role to be ‘settled’, while allowing for recent experience to facilitate recall in a leadership capacity (Sherlock and Nathan, 2008). The final research sample consisted of twelve leaders from a variety of industries (profit, not-for profit and creative) and organisational backgrounds (private sector/public sector, indigenous/multinational, family-business and religious). Table 1 below provides a profile of the research participants.

<table>
<thead>
<tr>
<th>Participant</th>
<th>Position Occupied</th>
<th>Industry/Sector</th>
<th>Years in Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant A</td>
<td>Bishop</td>
<td>Religious</td>
<td>9 Years</td>
</tr>
<tr>
<td>Participant B</td>
<td>Director</td>
<td>Banking</td>
<td>7 Years</td>
</tr>
<tr>
<td>Participant C</td>
<td>MD</td>
<td>Consultant Engineering</td>
<td>3 Years</td>
</tr>
<tr>
<td>Participant D</td>
<td>Director</td>
<td>Creative/Cultural</td>
<td>7 Years</td>
</tr>
<tr>
<td>Participant E</td>
<td>MD</td>
<td>Brewing</td>
<td>9 Years</td>
</tr>
<tr>
<td>Participant F</td>
<td>Director</td>
<td>Creative Arts</td>
<td>7 Years</td>
</tr>
<tr>
<td>Participant G</td>
<td>Director</td>
<td>Public Sector</td>
<td>4 Years</td>
</tr>
<tr>
<td>Participant H</td>
<td>CEO</td>
<td>Not-for-Profit</td>
<td>15 Years</td>
</tr>
<tr>
<td>Participant I</td>
<td>MD</td>
<td>Family Business</td>
<td>20 Years</td>
</tr>
<tr>
<td>Participant J</td>
<td>Chairman</td>
<td>Publishing</td>
<td>4 Years</td>
</tr>
<tr>
<td>Participant K</td>
<td>Party Leader</td>
<td>Political</td>
<td>4 Years</td>
</tr>
<tr>
<td>Participant L</td>
<td>Dean</td>
<td>Education</td>
<td>5 Years</td>
</tr>
</tbody>
</table>

The original research design assumed a phenomenological, qualitative, interpretive approach. The sole method of data collection was the research interview and a semi-structured interview format was adopted.

As with all longitudinal approaches, the follow-up study involved tracking-down and re-interviewing all of the original interviewees to explore what, (if any), changes had
occurred; the processes associated with those changes, and the contextual factors that appeared to account for those changes (Holland, 2007). In view of this, the follow-up study was driven by two research questions: How has the content of leader’s knowledge and the process of leader’s knowing/not-knowing evolved? What contextual factors appear to account for these changes? The purpose of this paper is not to address these questions, these have been dealt with elsewhere (Cooper, 2013). As previously stated, the main aim of this paper is to highlight the challenges involved in conducting qualitative longitudinal research, based on the author’s personal experience of and reflections on using this methodology.

**Research Findings**

This section of the paper brings to the fore the researcher’s experience of doing qualitative longitudinal research. This experience is discussed under the four challenges introduced earlier: grappling with time, managing and analysing a complex data set; understanding the researcher-participant relationship; and recognising the ‘longitudinal effect’ on the researcher. Under each of these headings, the author’s insights into crafting the research design, doing the fieldwork and analysing and presenting the data are drawn upon to highlight the realities of carrying out longitudinal research. The intention throughout is to provide some ‘rich insight’ and ‘thick descriptions’ into the ‘practice’ or ‘performance’ of qualitative longitudinal research; an aspect of the research methods literature that has been rather neglected (Sergi and Hallin, 2011).

**Grappling With Time**

As previously stated, time is central to any longitudinal study. As time may be conceived of in a variety of ways, a key challenge for the longitudinal researcher is to
understand the manner in which time is conceived by his/her research participants. In this research, the researcher adopted two perspectives on time. Absolute or objective time was complimented by subjective time, and in particular, the concept of ‘event time’. In adopting a ‘relativist’ approach to time, the author sought to capture the past, the present and the future; and (in line with the interpretive approach adopted), to do so from the perspective of the interviewee. To ensure this was achieved each interview followed a standardised format. The researcher opened each interview by reminding the interviewee where they were when we last met, the position they occupied, and any other significant event that was associated with that time. The purpose of this was to situate the past in the present as a form of ‘agreed marker’ from which we could then proceed. The interview then followed a standardised format: beginning with the past (what had occurred since we last met), moving to the present (what is happening currently), and, finally, ending with the future. The decision to introduce new questions in the re-interview situation, rather than repeating those originally asked (see interview protocol in appendix), was influenced by a number of factors. First, there was the notion of ‘question fatique’. Farrall (2006) speaks of the manner in which participants get bored if asked the same questions over and over again. Given the extended time interval between the research phases, and the existence of only two rounds of interviews, this was not really a concern for this researcher. Her main aim was to capture the key changes in the original research constructs (knowledge and knowing) that had occurred over time. With this in mind, and in view of the fact that most significant events entail or engender some form of change, in the second interview, greater emphasis was placed on these ‘critical incidents’ (Flanagan, 1952). In all cases, the distinction between what was considered significant or insignificant remained with
the research participant. The critical incident technique is considered useful in creating a focal point for discussion and as an ‘aid de memoir’ in creating retrospective accounts, particularly with respect to learning (Cope, 2011). For this reason it was very appropriate for this research. For example, asking participants what were the significant events that have occurred since we last met? was easily followed by probing questions such as: What did you need to know in that situation? How did you acquire that knowledge? Or What was the most significant thing you learnt from this incident?

While each interview covered the past, present and future, other than a general reference to the last time we met, in relation to each time frame, the researcher did not, unless pushed to do so, specify a particular time span (for example the common five-year measure), nor did she attribute greater focus (and by implication, more importance), to one or other time period, accepting that this would likely differ between interviewees.

In writing up each of the individual cases, the narratives were then told from the time perspective of the interviewees. This approach presented its own challenges in terms of data analysis. These are discussed in the section that follows.

**Managing and Analysing a Complex Data Set**

The importance of the data analysis stage is underscored by the significance of the challenges it presents. For this researcher, these challenges arose from three main aspects of the research design: the use of multiple cases; the extended time interval between the first and second phases of the research and the dominance of time itself as an explanatory contextual factor. Each of these factors are elaborated upon in the discussion that follows.
The use of multiple cases

The key challenge facing researchers who adopt a ‘multiple case’, as opposed to a ‘single case’ design is the existence of apparently contradictory goals: On the one hand the researcher is aiming to gather the ‘thick description’ and ‘rich insight’ (Geertz, 1978) that is characteristic of the intimacy one gains in a single site; On the other hand the researcher seeks to produce some level of generalisation across the different sites (Ragin, 2000). In struggling to achieve these goals the author was primarily guided by the advice of Einsehardt (1989) and Dey (1993), who suggest, being intimately familiar with each case as a stand-alone entity allows the unique patterns of each case to emerge before researchers push to generalise patterns across cases. With this in mind, a two-layered approach to data analysis was employed: In the first instance a ‘case-by-case’ analysis was conducted. This was followed by ‘cross-case analysis’ or cross-case comparisons.

Case-by-case analysis

The first layer of analysis comprised of a case-by-case analysis, with each of the individual research participants analysed independently of one other. This was a two-stage process: The first stage entailed constructing individual summary tables of the themes/sub themes within each interviews. With twelve participants interviewed twice, the resulting transcripts amounted to over five hundred pages. Other researchers have described this point in the research process, having completed the relatively mindless task of transcribing and feeling somewhat self-satisfied with the bulk of work done, one suddenly finds oneself overwhelmed, drowning in paper, unsure of how to find an entry point into the morass of data that one is now confronted by.
The scenario described was similar to that which the researcher found herself in. Her approach to survival was two-fold. First, recalling the words of her thesis supervisor, “let the data speak”, she returned to the raw data and began the rather arduous task of reading and re-reading the first interview transcript to get an initial sense of what was going on in the interview, what the participant was saying, feeling etc. Secondly, in an effort to structure or put some shape on her reading, the author sought assistance from the research methods literature. The contribution of Wolcott (1990) was particularly insightful in this regard. He recommends subjecting each of the transcripts to a set of broad open-ended questions. While Wolcott’s original probes appeared very apt for the nature of this research, slight adaptations were made where deemed necessary. In the end the process was guided by the following questions:

1. What is going on here?
2. What does the person in this setting have to know to do what he/she is doing?
3. How are knowledge and skills acquired, particularly in the absence of intentional efforts or instruction?
4. What does the author think the participant is feeling?
5. What was the author feeling at the time of interview, what is the author feeling now?

Sitting at her kitchen table, using A4 sheets of blank paper, the author took notes of the key themes and sub-themes from each interview. After about three iterations of this process the final notes were written up. The next stage was to construct a summary table of each interview identifying themes, sub-themes and presenting sample quotations for each of these. This process was usually conducted over a two-day period, with the
second day usually given over to reviewing and editing the previous day’s work. On completion, each table was allocated a one-line descriptor or metaphor (based on key words that ‘jumped’ out from the transcript), to encapsulate the researcher’s interpretation of the case. For example, the heading on one table, ‘Great Expectations: The Naked Bishop’ sought to communicate the elevation, esteem and infallability that accompanies appointment to an episcopal role; alongside the exposure and vulnerability that is often experienced by those who are placed on a pedestal.

On completion of a single table, an interval of a few days was allowed before tackling the next first-round interview. This time interval was considered necessary to avoid the outcomes from the analysis of one interview from overly influencing the analysis of the next one. This process was continued until a total of twelve tables were produced for the first phase of the research. On completion, the author replicated this process for the twelve interviews conducted in phase two. The entire process took approximately three months to complete. While the description presented here suggests a somewhat linear process, like all forms of interpretive research, the analysis involved returning again and again to the original transcripts or ‘looping back and forth’ as earlier decisions were re-evaluated or revised in the light of new insights (Miles, Huberman and Saldana, 2014).

The second stage in the case-by-case analysis was to construct an overall narrative or ‘case story’ (Richmond, 2002) for each of the individual research participants. To construct each narrative, the author followed the advice of Elliott (2005), who cites Mishler (1995) and Labov and Waletzy (1997), on the different forms of narrative analysis. Each case-story had four sub-sections. Whilst preserving anonymity, sub-
section one, provided a brief biography of the participant. Sub-section two provided a
narrative account of the first interview. Sub-section three provided a similar account of
the second interview with an emphasis on the key changes that had occurred in the time
interval under review. In writing sub-section three, the author referred to the work of
Farrall (2006) on qualitative longitudinal research that suggests a list of questions that
researchers might subject their data to. While he is clear that the list is not definitive, it
is recommended as a good entry point to the data for those embarking on the initial
stages of qualitative longitudinal research. Taking this advice on board, the author was
loosely guided by the following questions in writing up the account of the second
interview for each research participant:

1. What is the difference between time one and time two? The intention here was
to build up a picture of the general direction or trajectory of the individual’s
professional and personal circumstances.

2. Are there any epiphanies or sudden events that have triggered changes? Is there
acceleration of some factors that build up to a change? Are there any tipping or
turning points?

3. What has increased or decreased overtime? For example are there changes in
values, self-esteem or self-knowledge?

4. What is missing, what do the respondents avoid talking about? Avoidance of
certain topics may reveal things they are uncomfortable about which may go
some way to explaining their position, disposition or values.

5. What are the contextual processes that influence change and the timing of
changes?

6. Which changes support or oppose the process of human development?
7. How meaningful are the changes to the respondents?

8. Are the changes substantive or symbolic?

In sub-section four the author made some concluding comments based on her own analysis and interpretation of the two previous sub-sections.

Cross-case analysis

The second layer of data analysis involved a cross-case analysis of the re-occurring themes and patterns across the twelve cases. Once again the author reached a point of saturation. In addition to twenty four transcripts, (that amassed over six hundred pages of raw data), the researcher was now confronted by twenty four tables, each several pages long, highlighting numerous themes and sub-themes. With the benefit of hindsight the researcher would emphasise the importance of ruthlessness in the identification of themes and sub-themes at the earlier stage. Overwhelmed by the content of each table, it was necessary to review and refine each one to more manageable proportions. Once this was achieved the task of identifying commonalities or disparitites across each case, across both phases of the research began. This was no easy task. The difficulties in comparing multiple cases that are variable and context bound has long been recognised in the research methods literature. In this regard Eisenhardt’s advice ‘to make a good job of paritcularisation (within-case analysis), before looking for patterns across cases’ (Eisenhardt, 1989), served the researcher well. The depth achieved through compiling summary tables and individual case narratives ensured intimate knowledge of each case and a strong foundation for cross-case analysis. Despite this, cross-case analysis was no easy task. A key difficulty for this researcher was to find the best entry point into the data. In the end, three questions were used to
guide the cross-case analysis: What is common to all cases in phase one? What is common to all cases in phase two? What are the key changes that are common to all cases in the interval between phase one and phase two?

**The extended time interval between research phases – shifting time frames**

The notion of subjective time, and its ability to differentiate between past, present and future, was previously explained in a review of the literature pertaining to the qualitative longitudinal method. For this researcher, one issue that arose in the context of subjective time was the presence of ‘shifting time-frames’. In view of the extended time interval between the first and second interviews (a minimum of ten years in each case), events that were past in the first round interviews becomes the distant past in the second phase. Those which were considered the present, became the past, and events that were in the future in the initial interview, became present or recent past at the point of re-interview. In other words events were narrated more than once, but from different perspectives of what was past, present or future. To complicate matters further, in the re-interview situation, the respondents often talked about additional incidents or events, that, while they had not been spoken about before, clearly belonged the past in the first interview, and the distant past in this the second interview. The researcher struggled with these shifting time conceptions. Had she been aware of it at the time, Aaboen et al’s notion of mapping out the different events on a two-dimensional frame that differentiates between past, present and future, for each interview may have proved useful in this regard (see figure 1 below). In hindsight, it may also have served as an aid for remembering the situation as it was at the previous interview and reflecting on how it had developed over time (Aaboen et al, 2012).

<Insert Figure 1>
The extended time interval between research phases: Time as an explanatory factor

As previously stated, at a minimum, ten years had lapsed between the first and second round interviews. The researcher’s decision to revisit the original data was explained earlier. While the initial intention was to re-interview all of the research participants at a precise interval of ten years, this was not achieved for a number of reasons such as: tracking difficulties due to job changes and relocation (in one case the researcher had to travel overseas), non-response, lack of co-operation and delays/cancellations in interviewing instigated by the respondents. Sample-attrition (for these precise reasons), is well documented as one of the difficulties associated with the longitudinal time-lapse (Holland, 2007). In all, almost three years lapsed before the researcher managed to complete the entire twelve interviews for the second time. While this resulted in a longer interval between first and second round interviews for four of the twelve participants, for reasons of validity and generalisability the researcher judged this more favourable than an incomplete sample (Hassett and Paavilainen-Mäntymäki, 2013). After all, the precise time interval was not a critical variable in the study.

The passage of time, no matter how it is construed, or its duration, is central to all longitudinal research. The extended time interval that was a feature of this study resulted in significant changes in three contextual variables: the broader economic and socio-cultural environment, participant’s professional circumstances and their personal lives. The findings in this context have been elaborated upon elsewhere (Cooper, 2013); the intention here is not to re-hash them, but to draw upon them for illustrative purposes only.

From an environmental perspective, the interval between the first and second phase of the research represented a period of significant economic change; while Ireland’s economic boom was underway when the first phase of the research was conducted, the
second phase co-incided with the beginning of the economic downturn. With the economy in decline, participants spoke of an altogether more competitive marketplace, a more informed and demanding customer or client, increased legislation, all coupled with huge technological advancements in terms of new social media and the internet. All of these changes were occurring within a society that was becoming increasingly hostile and sceptical as former bulwarks of respectability, such as the catholic church, collapsed, and cases of corruption and fraud were uncovered across both the private and public sectors.

On these leaders’ changed professional circumstances, at the organisational level, these ranged from globalisation, changed organisational culture, changed organisational status, rationalisation, company closure and business start-up. At the individual professional level, participants described how their own role had evolved. Since our first meeting, across the twelve participants, five variations were in evidence: continuation in the original role, elevation to a new role (within the original organisation), taking up a new role in a new organisation; pre-retirement and post retirement. Although I was not aware of it at the time, three of these participants were a crucial juncture in their professional lives. This became apparent in the course of the following year as these participants each left their previous positions under different circumstances: one owner-manager sold the business, one left the company following takeover, and one exited involuntarily.

On a personal front, the fact that these leaders were at least ten years older at the point of re-interview is a change that is common to all participants. Now living their lives in the midst of ageing parents, teenagers and young adults, the knowledge these leaders now
prioritised expanded beyond the confines of the organisation and its environment embracing life lessons that encapsulated morality, ethics, values and their own mortality. In a similar vein the sources of their learning extended beyond the confines of the workplace and professional contacts to embrace, partners, family, friends and children. For example, while children were not a feature of the first round interviews, in the second interviews over half of the participants spoke about what they had learned from their children.

As stated earlier, the important issue here is not these findings per se, but rather what they illustrate in terms of the nature of longitudinal inquiry. These findings illustrate how time, as an explanatory factor, introduces a range of other explanations into the longitudinal analysis. In this research, changes in the content of individual leader’s knowledge and the process through which they acquired it, were linked to changes in three broader contexts, the environment, their professional circumstances, and their personal circumstances. Farrall (2006) highlights this as one of the central advantages of qualitative longitudinal research, its ability to link the micro (individual) to the macro (context).

An additional caveat must be inserted here. As Saldana (2003) advises, in any attempt to identify the contextual factors that appear to affect changes, their interrelatedness needs to be considered. In this respect, this researcher recognised that the impact of the external environment impacted on these leaders’ professional circumstances (at an organisational and individual level), and that their professional role impacted on their personal identity, in both a public and private capacity. In view of this, isolation of one set of factors over another is oftentimes problematic. While the researcher recognised
this difficulty, her intimate knowledge of the research data (based on the indepth nature of the analysis), allowed her to isolate individual professional circumstances, (or to be more precise, the stage of role transition), as the main factor that influenced what these leaders needed to know and how they came to know it.

Understanding Researcher-Participant Relationship

The researcher-participant relationship in a longitudinal study is unique in respect of the time that is invested by both parties. While this study did not have the ethnographic immersion that a real-time longitudinal study would generate Van Maanen (1988); the process of interviewing and re-interviewing generated a degree of familiarity between the researcher and researched that doubtless impacted on the research output. From the notes made in her research diary the author identified a number of roles assumed by both the researcher and the research participant.

The researcher as confidant, therapist or friend

The familiarity and openness engendered by the re-interview situation oftentimes reduces the constraints of formaility that may exist between the researcher and the researched; a degree of security and safety with respect to what is being discussed develops as the respondent believes they have an established relationship with the interviewer (Holland, 2007; Saldana, 2003). This researcher concurs with these assertions. Indeed, there were many times during the course of the second phase, when the researcher felt she was getting closer to the real person behind the job title. For the most part, in these second-round interviews, these leaders resorted to ‘story-telling’ (Gabriel, 2013), as they told me the story of their lives as leaders. In this vein they
related life-changing or ‘crucible events’ (Bennis and Thomas, 2002; George, 2003; George and Sims, 2007), many of which were adverse or negative. Such experiences included; business failure, over-trading, being exposed to corruption, subjected to suspicion and being drawn into areas they found ambivalent. In retrospective interviewing, it is not unusual for the participant to focus on adversity, indeed the process of recall is said to encourage this. An additional factor at play here may relate to the perception of ‘unfinished business’. Meeting me again, and most likely, in this context at least, for the last time, these leaders may have felt compelled to ‘come clean’, to present the ‘real’ picture. This is also characteristic of a re-interview situation (Holland, 2007). Furthermore, as previously mentioned, the fact that many of these leaders were coming close to the end of their careers might suggest that the stakes were reduced; they no longer had to save face or to appear at all times in control, they had, in some respects, nothing to lose. In at least two cases there was overt evidence of this renewed openness, with participants admitting that their organisations were ‘close to collapse’ when we first met, although they did not admit this at the time. In this context, it is worth re-iterating the comments of two participants: “Last time I met you, I don’t know if I said this to you, but the company was sailing off a cliff,” and in another case, “When we last met this organisation was on the brink of insolvency, ready for closure; since then I have crashed, burned out, and threw in the towel, gone fishing more than once.”

While my role in listening to their tales of adversity might be compared to that of a confident or even a therapist, in other respects I was treated as a friend. Again unlike the first round interviews when these leaders did not deviate beyond the confines of
their organisations and industries, second time around they appeared altogether more comfortable in relating personal accounts of family bereavements, coming to terms with their own mortality and retirement. When we first met, there was a sense that personal factors were very rarely allowed to cross the private-professional divide. This was borne out by at least one participant who apologised for bringing the subject of a very close and very recent family bereavement into the conversation, he remarked: “I am sorry for making it so personal I did not expect to get into that.”

Another manifestation of a blurring in the private-professional boundary was the emergence of each leader’s family in the second interview, and the significant role attributed to their children in terms of their own knowledge development. While in the first-round interviews children were never mentioned, in the second-round, eight of the twelve participants spoke of what and how they learned from their children.

Participation encouraged by a sense of curiosity or intrigue

As previously indicated, sample attrition is common in longitudinal research. While the researcher had some difficulty in completing the full complement of interviews the second time around; two factors appeared to encourage participation: one was the sense of intrigue the research approach engendered in participants, the other was a sense of guilt that they associated with non-participation.

On contacting participants more than a decade later, many of them were intrigued by what they perceived as the unique nature of the research approach. They were, for the most part, curious to know what they had said last time and while requests to see the previous transcript prior to the second interview were made upfront on a number of
occasions, the researcher declined this request. There are two schools of thought on this matter. One suggests, reviewing prior transcripts can contaminate the second interview as a result of undue influence; the other suggests this is not the case and that early offers of the transcript will incite participation and interest. Participants may also be somewhat flattered to think that the researcher thought their earlier comments sufficiently interesting to have warranted holding onto them for a lengthy period (Farrall, 2006).

Taking both arguments into account, the researcher adopted a middle ground. While she did not give the transcript prior to interview, she did promise that she would, once the second interview was complete. This promise of the transcript to some extent fueled the curiosity and intrigue.

While participants were not initially provided with the first transcripts prior to the second interview, excerpts from the first interview were often fed back to the participant at some point during it. On hearing an excerpt from his first interview, the remark ‘did I really talk like that ten years ago, that’s fascinating’ perhaps sums up the sense of intrigue that being re-interviewed after ten years (or more) generated for one respondent.

*Participation encouraged by guilt*

As this research progressed, to some extent it became a joint endeavour. Once I explained what I was trying to achieve, a certain amount of responsibility was indirectly placed upon each participant to ensure that the sample would be completed. In some respects, the participants, along with myself, had bought into, and were committed to the
idea of finishing what was started, they had assumed ownership for the project and no one individual wanted to be ‘the one who got away. Non-participation in the second-round interviews became a source of guilt for participants. In many respects, they assumed the role of ‘debtors’; they were in debt to me, they owed it to me to complete what we had started. This is best illustrated by the example of one of the CEO’s who on finally meeting me after several aborted attempts, remarked:

“I have been feeling so guilty about cancelling on you: I said to myself, if there is one thing I must do before I retire it is to meet that girl from the university”.

Participation encouraged by belonging – the virtual community
Several times over the course of re-interviewing I was asked, how many of the original group I had succeeded in re-interviewing and in some cases, who these ‘others’ were. Unintentionally, on either of our behalfs, these individuals had become connected, links in a chain that they did not want to break. Not only did they owe something to me, it would appear that they owed something to one another, they had become members of a virtual group.

Recognising the ‘Longitudinal Effect’ on the Researcher
Longitudinal studies that claim to capture the changed nature of particular phenomena from one period to the next, neglect the parallel, iterative developmental trajectory of the researcher over the course of the study. Indeed in an entire book on the longitudinal method, Saldana (2003: 33) says little on the topic, save the advice to: “reflect on your own life and how you have changed through time and how you are changing as a researcher”. Once again, the extended time interval that occurred between the first and second phases of this reason resulted in significant changes in the life of the researcher
as well as the researched. The following excerpt from the author’s PhD thesis, reflects on these changes:

Coming to the end of my journey, the importance of beginnings and endings comes to mind. I am certainly not the same person who started out on this journey, just as many of ‘my leaders’ were not the same people when I had the privilege to meet them the second time around. When I began this research I was young, single, and a novice researcher; in all respects, this is no longer the case. Obviously in the intervening time-period there have been very many changes in my personal circumstances. I am not the person they first met, they are not the people I first met. All’s changed, changed utterly (W. B. Yeats, 1916).

For this researcher, the most important claim in the aforementioned excerpt is the recognition that both parties have changed irrevocably. As researchers we are not immune from the changes our participants are experiencing, in longitudinal inquiry, we mirror those changes in many respects; we too grow older, move forward in our careers, face our own mortality. Throughout the second round interviews I often commented to fellow researchers how my participants had changed in the intervening time period; ‘they had mellowed, they were less arrogant and much more humane, they were all said much nicer people’. While these claims were somewhat in evidence in my research findings (for example, in the latter stages of their professional lives these leaders spoke of a return to earlier values, greater self-knowledge and the desire to operate with humanity and integrity), as a researcher, I failed to ask what my judgement said about me. Of course I too had changed. Perhaps my age and experience allowed me to bring out this part of them that, while it was always there I had not uncovered before? Or perhaps they were responding to something they now saw in me? This form of self questioning and self-reflection is a necessary, yet neglected part of the longitudinal journey.

**Conclusion/Implications**

Giving voice to practice, rendering the largely invisible visible’, telling the stories behind the stories, the tales of the trials and tribulations of doing research and being a researcher as opposed to repackaging what we do in the name of good science, ‘keeps us honest’ in our research endeavours (Donnelly, Gabriel and Özkazanc-Pan, 2013). In
greater pursuit of this, we need to refocus our agenda for ensuring rigor in qualitative inquiry, placing as much emphasis on ‘thick performance’ (Sergi and Hallin, 2011) as we have heretofore placed on ‘thick description’ (Geertz, 1973). This paper has shown the immense potential that qualitative longitudinal research has in meeting these challenges. This claim is supported by the three-fold contribution it makes.

Firstly, it presents rich insight into the conduct of longitudinal inquiry that identifies four critical challenges that extend to aspects of research practice with respect to both the researcher and the researched.

Secondly, in documenting her experience of both the mechanics of conducting qualitative longitudinal research and her personal reflections on this process and how it impacted upon her as a researcher, this paper contributes to the nascent conversation on process-related issues (Sergi and Hallin, 2011). As Hassett and Paavilainen-Mäntymäki (2013) have recently observed: “there is a distinct absence of accounts that accentuate and bring to the foreground researchers’ own experience and reflections on designing, conducting, managing and studying longitudinal research” (Hassett, and Paavilainen-Mäntymäki, 2013: 3). In moving into this domain, this research also addresses recent requests for qualitative research that takes a more reflexive (Finlay, 2002), autoethnographic (Pace, 2012) or storytelling approach (Gabriel, 2013).

Finally, in acknowledging the emergent nature of the research design and how it impacted on the research process and the researchers understanding of practice, this paper contributes to a discussion in the research methods literature which argues that the
pursuit of ‘good science’ oftentimes confines to the margins, or discards entirely, that which is real and honest about our research endeavours; the ‘lived experience’ and the ‘messiness’ of actually doing it (Cole, 2013; Donnelly, Gabriel and Özkazanc-Pan, 2013). In some respects, in the pursuit of rigour, we loose our relevance to the wider community of practice that is our fellow researchers.
Appendix

Interview Protocal: Phase Two

Part A: Significant Events
Q1 What has been happening since we last met?
   Perhaps you could recall one or two significant events that have occurred in the recent past or going further back to when we first met.

Part B: Significant Learning: Knowledge Gained
Q2 What did these events teach you? What knowledge have you gained?

Part C: Significant Others
Q3 In terms of others, are there particular people who have helped you to move forward since we last met? What knowledge have you gained from them?

Part D: With the Benefit of Hindsight
Q4 If you could go back in time to the beginning of your career, or to the time you took up this position, or to the time we first met (you specify), what would you do differently and why? What advice would you like to have been given and who would you liked that advice to have come from?

Part E: The Present
Q5 What is happening in your life at this present time? What do you need to know? What types of knowledge do you need to have? How do you acquire this knowledge? Is the knowledge that you need changed, or is it changing? How do you keep up to speed with changes in what you need to know/how do you keep abreast? What or who do you rely on most in doing this?

Part F: The Future
Q6 If you could draw on all the knowledge you have gained over your career, what advice would you give to someone else starting out?
References


Finlay, L. (2002). Outing the researcher: the provenance, process and practice of reflexivity. Qualitative Health Research, 12 (4) 531 - 545


