

INTRODUCTION

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A realist sampling strategy accepts that a sample is chosen to test presuppositions that express the interplay between human agency and structures and their real causal powers in complex systems (Emmel, forthcoming 2013). It is a weakly constructivist and strongly interpretivist strategy. In the early stages of research, based on considerable investigation of the research problem, we identify ideas about that which is being investigated, which we will want to test and refine in the field. This purposive work is part of our sampling strategy. It informs the selection of particular cases, purposefully chosen because they are information rich. Their purpose is to test and refine theory. We may choose a sample early in the research and given QL's temporal reach we may purposefully boost the sample during the research. Unlike in grounded theory approaches, we do not discover (Glaser and Strauss, 1967) nor strongly construct (Charmaz, 2008) new theoretical understandings through its co-production with participants. Theory does not fall out of the data we collect. It is the product of a strongly interpretive engagement between these data and the ideas the research team bring to these data through their analysis. The intention is to produce explanations of the causal powers and liabilities, or generative mechanisms, which act in particular contexts to bring about observed outcomes. These explanations are partial, incomplete, and provisional, but seek to explain what works for whom, in what circumstances and respects, and why (Pawson, 2006).

Qualitative longitudinal (QL) research provides extended opportunities to test and refine theory because we can revisit, reappraise, and reconfigure the sample in the research. Rachel Thomson and Janet Holland (2003) observe that narratives in QL research privilege biographical accounts and trajectories, while cutting across these narratives are dynamic and contingent life events and circumstances. The sample is 'subjects in process', dynamic yet contingent upon historical events and context. Through recognising these features and explicitly incorporating them into a sampling methodology we are better able to situate and refine theories of the topics that we are investigating.

KEY POINTS

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- QL research allows us to investigate social processes which are relatively enduring, yet dynamic, and evoked afresh in the light of new knowledge.
 - The sample is subjects in process, contingent upon historical events and context. Through explicitly incorporating this contingency into sampling strategies we are better able to situate and refine theories of that which we are investigating.
 - The sample changes through time. These information rich cases facilitate comparison, the refining of ideas, and the interpretation and explanation of generative causal mechanisms

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Sampling in Qualitative Longitudinal Research: A Realist Approach

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Drawing on our research investigating the texture of poverty in a low-income estate in the North of England over a period of 12 years, this methods guide considers how QL research has challenged us to think differently about sampling in qualitative research.

BACKGROUND

Our QL study (1999 and ongoing) is conducted in a geographically bounded low-income social housing estate. Our focus is the poorest and most vulnerable families living on the estate (Emmel and Hughes, 2010). Our QL research investigates and interprets their accounts of the texture of poverty in various aspects of their lives—growing up, relationships with service providers and others on the estate, access to health services, and their relationship to wider social, economic, and political events and processes. Our latest research project (2008 and ongoing), Intergenerational Exchange, is an investigation of how grandparents experiencing poverty care for and support their grandchildren over time.

RESEARCH DESIGN AND PRACTICE

In conducting QL research we accept that while social processes might be relatively enduring, they are dynamic, contingent, and evoked afresh in the light of new knowledge. While the material conditions of the subjects of study may well stay the same throughout the research, the social processes under investigation, in our case – the dynamics of grand parenting and care for their grandchildren – are likely to change. This will affect the nature and characteristics of the sample. The ways in which the grandparents in the study talk about their experience of grand parenting, and the ways in which these change and stay the same relative to dynamic contextual processes, like changes in policy or family relationships for instance, are the focus of our enquiry.

The Sample Changes Through Time

In Intergenerational Exchange the subjects in our enquiry are twelve grandparents in eight family units. Our regular re-visits to these grandparents reveal how the experiences of grand parenting can change in important ways. In one of our cases, that of Sheila and her partner Brian, the change has been extreme. When we first interviewed Sheila over eight years ago her partner had just been thrown out by their two eldest sons. A much later interview was conducted shortly after Brian had died. In the first interview, Sheila talks about Brian thus:

We threw him out, and we're better off without 'im. Good riddance to that.

And in the interview after Brian had died:

... I just call him a silly old bloody bugger, me. He could've stopped (drinking) ... cos, to me, he'd got eight kids, he'd got grandkids, he should of stopped, he'd of been around for his grandkids and kids then.

These shifts in participants' meanings and experiences of grand parenting relationships need to be understood in relation to the detailed accounts of their broader biographies and histories. These accounts of the dynamic contexts within which participants relate their experiences enable us to grasp the meaning of change in our sample over time .



QL Research Helps Us Focus on Contingent Powers and Liabilities and the Sample

The contingency of historical events in relation to experience and biography is emphasised in interviews with Bob about the economic recession. In the first interview, carried out shortly after the start of the recession in 2007, Bob observes that this recession, like all the recessions since the 1980s will have little effect on him and his family, since this family has long experience of unemployment and poverty. A further interview conducted in 2009 after the Chancellor of the Exchequer announced changes to the benefit system evoked a very different response. Bob felt these changes would significantly disadvantage his household economy. Wider social processes lead to a reshaping and re-describing of experiences in the present and a reformulating of hypotheses about the future. Once again, if we are to adequately describe our sample, we must move beyond reporting its salient features, to providing an explanation of the changing context within which events and experiences are described. Only then are we able to produce explanations that account for the insights we gain into what it said, for what reasons, why, and in what circumstances.

QL Research Supports the Testing of Causal Generative Mechanisms

Researchers bring particular theoretical presuppositions to be tested to the research. One of these was an idea negotiated within the research team which described grand parenting norms of 'being there' and 'not interfering' (Mason et al., 2007).

We called the mechanism 'leisure and pleasure' grand parenting. This idea was familiar to two members of the research team who have young children. These ideas are rational, yet fallible judgements about competing theories, models, and concepts that frame the sample. Yet, our sample talked about caring for their grandchildren very differently.

In an early interview, Carolyn and Victor explained how they removed their grandson, Riley, from their daughter's house 'to get him back into a routine', when they saw that constant partying and drug-taking meant that Riley was not getting regular meals, nor being put to bed at a time they considered proper.

In the research team we explained this kind of grand parenting as rescue and repair. However, in an interview conducted six months later Carolyn and Victor provided a very different account of their care for Riley. By this time their grandson was back with his Mum, who had now moved house, settled with a boy-friend, and was employed on a training scheme. The account in this interview is about supporting their daughter through childcare and doing nice things with Riley, such as taking him to the park and for treats. This account is very different. It is one that resonates with the idea we had at the beginning of the research when the research team discussed leisure and pleasure grand parenting. It differs in important ways from their earlier account, dominated as it was by rescue and repair.

We do not have to treat Carolyn and Victor's accounts as one case. Here are two cases, collected at different times, in which different mechanisms, 'wayward daughter' at time one, and 'settled daughter' at time two are acting on the regularity, the ways in which Carolyn and Victor feel they can care for their grandchild. As can be seen the mechanisms are very different, fire fighting has been replaced with ice cream. Recognising that the sample changes through time facilitates comparison, the refining of ideas, the interpretation and explanation of the generative causal mechanisms at play in the acts of grand parenting in particular contexts.



CONCLUSION

Qualitative longitudinal research allows us to engage with our sample through time. We are able to investigate and interpret social processes which are relatively enduring, yet dynamic, and evoked afresh in the light of new knowledge. QL methods bring into sharp focus the ways in which biographical accounts and trajectories intersect with dynamic, contingent life events and circumstances. A realist sampling strategy includes considerable purposive engagement with the research problem, in which researchers develop ideas as presuppositions to be tested and refined in the research. We purposefully choose information rich cases to do this interpretive work. QL research facilitates comparison, the refining of ideas, and the interpretation of the generative causal mechanisms as the sample changes through time. The cases we construct and reconstruct in the research afford opportunities for interpretation because QL research provides extended opportunities to test and refine theory through revisiting, reappraising, and reconfiguring the sample in the research.

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