INTRODUCTION

Dynamic research in the social sciences has largely been dominated by quantitative approaches, for example through the analysis of large scale panel surveys and cohort studies (Berthoud and Burton, 2008). This is not to overlook the growing contribution made by qualitative researchers. There are a number of qualitative research techniques which aim to adopt a temporal dimension, including, for example, biographical methods such as oral and life histories.

Qualitative longitudinal research is based on the methodological suggestion to 'take time seriously' in research design and analysis (Bechofer and Paterson, 2000). Its methods are increasingly being used across a wide range of disciplines and fields. However, the objects of such research have typically been individuals or families, rather than organisations.

This guide examines the emerging use of qualitative longitudinal research in the third sector, by which we mean the world of voluntary and community action, charities and social enterprise. In order to discuss the potential of the approach and to illustrate the method in practice, we outline one study of third sector organisations and activities. We describe firstly the study's rationale, followed by an outline of how the research is designed and structured, and some reflections from the first stages of implementation. We conclude by considering the wider use and interest in using qualitative longitudinal methods in third sector research.

KEY POINTS

- Typically the units of analysis in qualitative longitudinal research are individuals and families. However, three studies in the UK are using qualitative longitudinal methods to examine the development of third sector organisations.
- A longitudinal approach offers a promise of developing an account of unfolding dynamic organisational life in the third sector; of understanding what happens next and why.
- The focus on organisations opens up a range of research dilemmas. Recruiting and retaining third sector organisations in a qualitative longitudinal study can be a prolonged and engaged process, and signals the importance of building enduring relationships.
- Access to research participants and consent may be required at two levels: the organisation and the individual. The former raises the issue of who has authority within an organisation to confer access, and how this shapes subsequent research encounters elsewhere in the organisation. In practice, participation has to be continually re-negotiated.
- Some ethical dilemmas in longitudinal research take on a temporal character, as both researchers and participants may wish to wait for the 'dust to settle' from the 'pressure of the moment' before discussing particularly sensitive issues in organisational life.
- Qualitative longitudinal research requires some considerable organisation and skill in both data management and the increasingly complex analytical task of making sense of data collected over time. Simplifying data reduction devices such as narrative profiles can help in this process.

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'What Happens Next?' Researching the Third Sector Using Qualitative Longitudinal Methods

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BACKGROUND

Research into different aspects of the third sector often adopts a cross-sectional design, in which 'snapshots' of issues, activities or organisations are taken and somewhat frozen in time. Single surveys or sets of interviews, or single or comparative case studies can certainly be informative, and may enable suitable inferences to be drawn by comparing cases or sub-samples. However, rather less insight is gained into how and why things change. How, for example, do organisations, or the issues they encounter, develop and change? How do individuals and organisations respond to the challenges they face? And what are the circumstances in which third sector organisations endure, or come to an end?

Case study research in the third sector often involves researchers establishing contact and gaining consent, and then over an intense period undertaking a series of interviews with different people associated with each case (for example managers, volunteers, trustees, clients and users) about the particular topic driving the research. This can look rather like a 'short sharp shock'.

However the challenge in this approach is how to appreciate organisational life as potentially dynamic, involving change, development and emergence. An issue or set of circumstances examined in a research study is rarely contained in that foreshortened research moment. It has a beginning before the research, an ongoing movement, and a continuing story after the research involvement. In so far as a study is focused in the present, it can suffer from what is known as research 'censorship' (Walker and Leisering, 1998). Unless it adopts a detailed retrospective viewpoint, it may close off enquiry into how issues, topics and organisations have become as they are at the point of research attention ('left hand censorship'). Unless the duration of research engagement is extended, it might close down enquiry of how issues, topics and organisations evolve, develop and change over time ('right hand censorship').

Conclusions drawn from a cross sectional study might thus be limited insofar as research objects change and research involvement has been collapsed over time. An extended involvement has the potential to capture and appreciate this dynamism, and begins to explore understandings and explanations of change. Qualitative longitudinal research aims to develop a more dynamic account of social and organisational change, through the use of 'moving pictures' of unfolding processes over time. This suggests the need for a longer 'real-time' research association with third sector participants.

RESEARCH DESIGN AND PRACTICE

'Real Times' is the Third Sector Research Centre's qualitative longitudinal study of third sector organisations, groups and activities. Over a four year period the study is following the fortunes, strategies, challenges and performance of a diverse set of fifteen 'core' case studies of third sector activity, and their relations with a number of 'complementary' case studies. It involves a prospective longitudinal design, following Andrew Sayer's description of 'intensive research', where close examination of a number of concrete cases facilitates a qualitative exploration of processes and dynamics (Sayer, 1992).

The overall purpose of the study is to gain a more in-depth and realistic understanding of how third sector organisations, groups and activities work in practice over time. This involves attention to three supplementary questions: what *happens* within third sector organisations over time and why; what *matters* to third sector organisations over time and why; and how might we understand *continuity and change* in third sector activity?

The research is oriented around four substantive anchor points:

1. Fortunes: What influences the fortunes of third sector organisations?

2. Strategies: How do third sector organisations regard and negotiate the environments in which they operate?

3. Challenges: What challenges do third sector organisations face and how do they respond?

4. Performance: How is the 'performance' of third sector organisations understood by different stakeholders?

Through these, the study aims to contribute to the development of a theoretically informed account of the third sector 'from the inside'. The longitudinal approach allows us to examine the dynamics of third sector activities over time, in effect to understand what happens next and why.

The study has three key features. Firstly the 'cases' are different forms of organised third sector activity. The case study sample involves a diverse range of organisations and groups, based on internal aspects such as, for example, organisation size, age and function/policy field, and on different aspects of the setting in which cases operate such as, for example, urban and rural, relative affluence and deprivation, and local political context. The sample would not be regarded or described as 'representative' in a statistical sense and should not be assessed in such terms. Instead it aims to be broadly reflective of a diverse range of third sector activities and the range of contexts in which they occur. Secondly, the sample involves a

'tiered' relational structure, with cases studied at two levels of intensity: fifteen 'core' case studies and, for most of these, up to three related 'complementary' cases. The relationships between 'core' and 'complementary' cases may be collaborative, competitive, harmonious, conflictual; or perhaps all of these. The design enables an examination of these inter-organisational relationships over time. Thirdly, in order to explore the dynamics of third sector organisations and activities, the study envisages successive waves of fieldwork for 'core' and 'complementary' case studies.
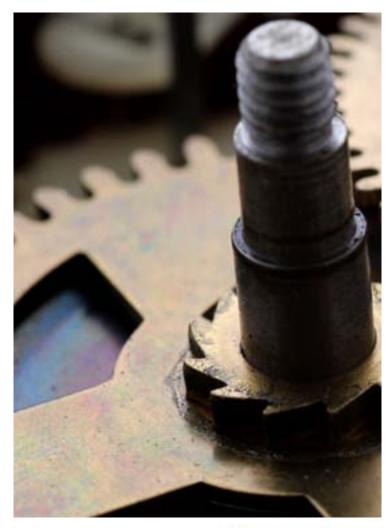
There were remarkably few refusals to participate in the study. 'Real Times' is proceeding with fifteen core case studies, twelve of whom were on an original candidate list of sixteen. None have withdrawn from the study to date, and this raises the question of how enduring research relationships can be initiated and embedded. At least part of this might relate to recruitment efforts. In practice, this proved to be a rather prolonged but endlessly fascinating process. Initial contact was made by email or telephone in order to introduce the idea. Some of the case studies were known to us beforehand and this smoothed the process. But in cases with no prior relationship, an extended negotiation was more likely, with concerns raised about anonymity and exposure, the time and resource implications of involvement, and how the case studies might expect to benefit from the research. In one case study recruitment took 179 days from initial contact to agreement to participate.

However, what does 'agreement to participate' mean and who or what exactly are we recruiting? In an organisational setting who is giving consent to what kinds of access, and with what authority can they claim to decide on behalf of a collective? Are all members of an organisation subsequently bound to participate? We developed a dual consent process for recruiting the case study as a whole at the outset of the research, and then for individuals when approached for interview.

The former gives general permission to access the organisation, and arguably sets a series of expectations for the research period ahead about what would happen. However, this has to be continually renegotiated in a longitudinal study, and can prove problematic in third sector settings with multiple stakeholders and lines of accountability, which might not have the formal hierarchical structures and lines of authority seen in other organisational contexts. In itself this raises the interesting research question of 'who's in charge?' and opens up the idea of sometimes delicate power and authority relationships within third sector organisations, and how they change over time.

An additional dilemma concerns the relational aspect of the design. Finding and recruiting suitable complementary case studies involved a departure from the principle of strict anonymity. We discussed and agreed with core case studies which organisations in their field have a bearing on their work, either as partners, competitors or as support organisations. Given that the relationship between core and complementary case studies is the focal point for this aspect of the research, these complementary case studies would know why they had been approached. In some cases the insights about each organisation would be extremely sensitive, and illustrates the need to build strong trusting relationships (a theme also explored in other methods guides in this series) and to ensure that case study data is not shared across potentially competing organisations.

In practice some immediate ethical dilemmas have arisen from the research, focusing on what might be called troubling times in organisational life and the 'pressure of the moment'. Researchers may get uncomfortably close to witnessing the trials, tribulations and conflicts of everyday third sector life. Given that 'Real Times' is aiming to provide insights into what actually happens and matters over time, we will want to ask further questions, particularly if these could be revealing moments from the research study's point of view. But this may become intrusive. Organisational participants may wish to limit access to extremely sensitive issues until the 'dust settles', when they may feel more comfortable in offering what amounts to a retrospective view of the issues and events. Conversely, participants (and other audiences) may wish to know what findings are coming out of the research before researchers feel confident and ready to disclose.

They might ask for direct access to research material which could shed light on current sensitivities and conflicts. In the first case the researcher prefers access now, but the participants only grant it later on, whilst in the latter case participants want access to data now, but researchers may wish to defer and deflect.

The 'Real Times' programme involves semi-structured interviews with a range of people associated with each case study, observations of activities, such as meetings and events, and collecting various documents produced by and about the organisation or locality. The timing of visits to case study sites involves some important methodological and practical dilemmas and trade-offs. Frequent and intense research engagement may allow a keener appreciation of ongoing processes and change, literally as it happens, and may enable a stronger research relationship to develop. However, this may become a burden on both the research team and the case study organisations, with exhaustion and attrition the result. In addition it may reduce the iterative advantage of qualitative longitudinal research, where later waves of a long term study can be informed by earlier waves. Less frequent research engagement may help overcome this, but runs the risk of generating rather superficial and less immediate or raw accounts of organisational life and change. Researchers and participants may be less burdened, but they will both in part be involved in a qualitative longitudinal catch up exercise, and it may be a struggle to chart the progress of issues and events over time.

With fifteen core case studies, and a range of complementary case studies, a wealth of data is being collected, and there is a danger of 'death by data asphyxiation' (Pettigrew, 1990: 281). As with qualitative longitudinal studies of individuals and households, the analytical task of making sense of material gathered over time becomes increasingly complex, and requires some skill in data management, reduction and analysis (see methods guide no.6 within this series for further details on this theme).

There are three analytical approaches in operation in the study. Firstly, an ongoing narrative profile of each case study is being constructed following each wave of research (Thomson, 2007). The aim here is to develop a longitudinal account of each case study's movement over time. When brought together these form the basis of the overall longitudinal analysis of the sample, for example, around understanding change in the key anchor points such as 'fortunes' and 'strategies'. Secondly, using NVivo qualitative software, transcripts and field notes are being coded using a broad general coding frame for ease of organisation. This approach lends itself to the development of specific thematic analyses, for example on inter-organisational relationships, ethos and mission, or career trajectories. Thirdly, more specific thematic 'story-lines', involving issues arising and unfolding across a number of contrasting case

study settings, are being explored, such as the question of governance and leadership, or work around influence and campaigning.

CONCLUSION

There appears to be a growing interest in the potential and promise of qualitative longitudinal research for increasing our understanding of the causes, meanings and experiences of social change, and for generating new perspectives on policy and practice. We have described the rationale and early stage implementation of one qualitative longitudinal study of third sector activities, paying some attention to the dilemmas of design, methodology and research practice.

However, in the manner of delayed buses approaching a windswept bus stop on a dark morning, three qualitative longitudinal research studies of the third sector have actually come along at once. In addition to 'Real Times', two other third sector longitudinal studies are underway. Northern Rock Foundation has funded the 'TSO-50' longitudinal study of third sector organisations in the North East of England and Cumbria, as part of its 'Third Sector Trends' research programme (Chapman *et al*, 2010). The aim is to interview participants in a varied sample of fifty third sector organisations every two years. In addition, the Scottish Government has funded a three year study of twenty third sector organisations to examine the changing public services landscape in Scotland (Osborne *et al*, 2011).

The three studies have slightly different purposes, but because they have also adopted slightly different approaches, there is plenty of scope for sharing experiences and learning about the design and practice of qualitative longitudinal research in the third sector. However, more importantly, they allow some scope to assess whether and how new insights may emerge in the study of third sector organisations and activities. There is the potential to share such data across these studies, thereby enhancing the evidence base on the third sector through secondary analysis. In short, by researching the third sector over time, qualitative longitudinal research offers the possibility to find out and seek to understand 'what happens next' in the everyday life of the third sector.

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