

The return of the researcher: the methodological challenges of a follow-up study

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Abstract

Purpose – The aim of this paper is to advance understanding of the methodological challenges involved in conducting a “follow-up” study. This article provides reflections on the reality of conducting such studies, documenting the researcher’s personal experiences and reflections on returning to interview the same sample of leaders over a 24-year period.

Design/methodology/approach – The empirical foundation is based on the lead author’s personal experience of conducting interviews with the same sample of leaders in 1997, 2007 and 2021 using a phenomenological, qualitative approach with semi-structured interviews. A temporal analysis was conducted (as past, present and future perspectives changed across waves), which required careful chronological mapping of events and changes for each participant over the 24 years.

Findings – The study reveals key challenges that are amplified in follow-up research compared to standard longitudinal designs. These include maintaining consistency while adapting to changed contexts, managing complex, temporally layered data and navigating evolved researcher–participant relationships. The findings are synthesised into the 4C Framework of follow-up inquiry: consistency, contextualisation, complexity and connectivity.

Originality/value – While guidelines exist for conducting longitudinal qualitative research, reflexive accounts documenting the lived experience of follow-up studies are rare. This paper provides an honest account of the unique challenges researchers face when returning to study the same participants after an extended interval. The resulting 4C Framework offers practical guidance to researchers and represents the main contribution of this study.

Keywords Follow-up study, Qualitative longitudinal research (QLR), Leadership, 4C framework

Paper type Research paper

1. Introduction

While longitudinal studies are commonplace in leadership development, fewer studies employ true longitudinal data involving three or more phases of data collection (Cotrim and Da Silva Gomes, 2024). Furthermore, while the literature presents ample guidelines for conducting qualitative research longitudinally (Saldana, 2018) personal, reflexive accounts that document the reality of engaging in longitudinal research are in short supply (Hassett and Paavilainen-Mäntymäki, 2013). The primary purpose of this paper is to address this imbalance through presenting the authors’ experiences of, and reflections on conducting a particular type of Qualitative Longitudinal Research (QLR), that is, a follow-up study (Holland, 2007). In so doing, this paper aims to provide guidance to QLR researchers navigating the various challenges associated with the collection and analysis of data within a follow-up study.

Follow-up studies track the same participants or phenomena over time to examine longer-term outcomes, maintaining strong methodological continuity with the original research (Holland, 2007). This is similar to sequel studies which also build on previous findings, but



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typically employ modified approaches to expand understanding of the original phenomenon (Pye, 2001). As with all longitudinal research, both approaches infer temporality and the practice of returning and going back “rekindling research projects and prolonging their longitudinal dimensions in ways which had not been anticipated at their inception” (Miller, 2015, p. 296).

Our context is leadership development, which inherently involves change (Day *et al.*, 2021). More specifically, leadership development seeks to understand how individuals develop as leaders, necessitating researchers to be more mindful of timescales and temporal methodological design choices (Day *et al.*, 2021). Longitudinal research recognises that change evolves over, rather than because of time (Ployhart and Vandenberg, 2010). Within the leadership development space, recent research has highlighted the need for longitudinal investigations of leadership development experiences and qualitative studies examining leadership evolution across life stages (Liu *et al.*, 2021). While considerable attention focuses on identifying high-potential young adults (Little and Kearney, 2021), there remains a significant gap in understanding how senior adults, both in formal and informal leadership roles, leverage their accumulated expertise to create lasting impact and mentor subsequent generations (Liu *et al.*, 2021). While our research addresses these scholarly calls, we specifically emphasise the methodological challenges inherent in conducting follow-up studies, complementing existing longitudinal leadership development research (see, Cotrim and Da Silva Gomes, 2024 for review). In addition, we respond to Hassett and Paavilainen-Mäntymäki’s (2013, p. 3) observation regarding the importance of accounts that “accentuate and bring to the foreground the researcher’s own experience and reflections on designing, conducting, managing and studying longitudinal research”.

QLR often entails participant and research reflections and interpretations on the data collected due to the passage of time (Miller, 2015; Thomson and Holland, 2003). Reflexivity can be seen as a means for the researcher to clean out the impact of themselves (O’Reilly, 2012) and avoid the traps of “relentless introspection” (Thomson and Holland, 2003). For the researcher, commitment to remain attuned to participants’ lived experiences while simultaneously bracketing personal reflections represents an idealistic methodological aspiration, difficult to operationalise in practice (McCoy, 2017). While the empirical findings present substantive value, the principal focus of this paper is to critically examine the methodological complexities inherent in the implementation of longitudinal follow-up investigations. Challenges commonly associated with QLR include continuity of funding and personnel (Thomson and Holland, 2003), yet an exploration of deeper methodological issues in engaging in follow-up studies have received little attention in the literature (SmithBattle *et al.*, 2018). Hence there exists a need to accentuate and bring to the foreground the researcher’s own experience and reflections on designing, conducting, managing and studying longitudinal research.

The paper is organised as follows. First, it examines the nature of qualitative longitudinal inquiry and the challenges associated with conducting it. Next, it provides an overview of the research design of the study that acts as the foundation for this paper. This is followed by the research findings which document the researcher’s personal experiences of and reflections on conducting a follow-up study. These are presented in terms of issues common to any research project: establishing the research parameters; managing and analysing a complex data set and factoring in the researcher-participant dynamic. Relating these to the epistemological and practical challenges facing longitudinal researchers in general; the chief contribution of this article is the development of a guiding framework which highlights the critical challenges amplified by returning to an original sample set. This framework encapsulates the 4C’s of follow-up enquiry: consistency, contextualisation, complexity and connectivity, and offer a guide to researchers navigating the challenges posed by follow-up research. In the concluding section the authors outline the theoretical and practical implications of the account provided and the scope for further research in this area.

2. Research background

2.1 The nature of QLR in leadership

Longitudinal research seeks to examine changes over time and why those changes occur (Cotrim and Da Silva Gomes, 2024). Within this domain, the usual quantitative versus qualitative distinctions apply; with quantitative longitudinal approaches, grounded in positivistic foundations, measuring the extent of change and the prevalence of factors affecting it, while qualitative longitudinal approaches develop a deeper understanding of the nature, causes and consequence of these changes. Indeed, in fields such as healthcare, where predominantly positivist orientations are evident, QLR has been argued to assist in adding depth of understanding where phenomena evolve over time (Carduff *et al.*, 2015). In view of the qualitative nature of the study that underpins this paper, phenomenological, interpretivist qualitative methods of longitudinal inquiry provide the context for the insights generated. The advantages of qualitative approaches to research are well-known with voluminous references in the literature to the “thick description” (Geertz, 1973), “rich insight” (Fineman and Mangham, 1983), “full, earthy, holistic and real data” (Miles, 1979) that such approaches entail. In particular, QLR approaches afford the researcher greater depth and nuance of insights to navigate changing temporalities over time. The interest and subsequent emphasis, here, is on the distinct advantages of a qualitative approach to leadership as a specific area of research. For a large part, these arguments centre on the extreme and enduring complexity of the leadership phenomenon itself. This is powerfully exemplified by the fact that “after literally thousands of studies in the field, a general theory of leadership that explains all aspects of the process adequately has yet to be developed” (Yukl, 1994, p. 19). As Conger and Kanungo (1998, p. 2) noted: “For the foreseeable future, there will be no endpoint, a moment where researchers will be able to say that’s it, now we have a complete and shared understanding of leadership”. This point remains relevant today.

Complexity in the discipline is a by-product of several important characteristics of leadership. Firstly, a crucial aspect of leadership is the ability to influence others (Yukl, 1994). Secondly, leadership is closely associated with the notion of change (Paine *et al.*, 2024; Tichy and Devanna, 1986). Thirdly, leadership is embedded in multiple levels or “nests” of phenomena (Avolio and Bass, 1995). Events such as achievements, failures, opportunities and crisis are constantly shaping and reshaping leadership beliefs, actions, motivations and experiences for both the leader and the led. Finally, leadership has a symbolic and subjective component, an ever-shifting reality, where human beings shape its creation (Morgan and Smircich, 1980; Pondy *et al.*, 1983). The literature contends that mainstream research methodologies have only been partially successful in theorising about these aspects of leadership (Parry, 1998). Consequently, recent research supports the case for more qualitative and longitudinal approaches to leadership development (Cotrim and Da Silva Gomes, 2024; Liu *et al.*, 2021).

Retrospective studies dominate the domain of qualitative longitudinal inquiry. Research designs adopting this approach are primarily concerned with building up a picture of the past and changing perceptions of the past. While they are chiefly concerned with historical change, they can also be utilised to understand the present (through the lens of the past), and the future through facilitating respondents to conceive of temporally distal potential futures. Capturing the nuances of changes through time requires creative data collection methods. In this respect, retrospective studies utilise a variety of techniques such as: autobiographical diaries (Cardell, 2017); “narrative analysis” (Josselson and Hammack, 2021) or “life-course research” (Shanahan *et al.*, 2016).

Across the range of prospective studies, three variants are in existence: repeated cross-sections, panel or cohort studies and follow-up studies. In repeated cross-sectional approaches change is inferred through interviewing or observing the same, or different, representative samples of populations at regular or irregular intervals. In panel or cohort studies, the sample consists of one or more specialised cohorts with shared experiences or

similar life trajectories whose changing fortunes can be documented through repeated interviews. The aim of these studies is to do more than compare two or three snapshots over time, but to ground the data in an exploration of processes and change which look both backwards and forwards in time. The report “Growing up in Ireland” (McNamara *et al.*, 2019) that studied the lives of a sample of Irish nine-year-olds in 2006, and as thirteen-year-olds in 2010, is one such sample. Follow-up studies are another variant of prospective studies. In follow-up research, while repeat interviews are not initially planned, for reasons relating to various exogenous changes, a pre-existing sample is tracked down and re-interviewed to chart changes in circumstances and participants’ perceptions of these changes.

Prospective studies are less common than retrospective studies in the field of QLR due to the time lapse required to capture change, the difficulties associated with tracking respondents, and the pressure on most academic researchers to publish within a relatively short-time frame (Miller, 2000). Where utilised, they tend to be of smaller scale and shorter duration, although there are notable exceptions (Pettigrew, 1990). While the research interview is a common methodology used in prospective studies, ethnographic approaches such as “participant observation” and “shadowing” can enable researchers to immerse themselves in the day-to-day flow of the lives of their research subjects, providing a richer experience.

2.1.1 Time and temporality in QLR. At this point it is important to reflect on the nature of time and temporality in QLR and the potential of QLR to address the theoretical complexity time and temporality introduces in longitudinal research design (Dawson, 2014). While the role of time in organisation studies has received some attention, as noted by Hernes and Schulz (2020), a growing body of research has highlighted the importance of time as a medium through which individuals frame and convey their realities. As such there is need for greater theorisation around the nature of time in understanding change (Dawson, 2014), particularly in the area of leadership development (Day *et al.*, 2021). Adopting a chronological perspective, time can be viewed as linear, sequential and objective; however, chronological time is atemporal, not accounting for the deeper relations between past, present and future (Pulk, 2022). Moving beyond objective considerations of time, Shipp and Jansen (2021) highlight the value of subjective time in organisational research (i.e. the experience of past, present and future as individuals mentally travel through and perceive and interpret time).

Time may also be viewed as having a vertical dimension, congruent with the work of Spinoza, wherein an eternal, timeless self emerges, representing a culmination of selves across time. This is important, as transcending the present to situate leadership development in time, incorporating past, present and imagined future selves requires the analytical flexibility afforded by qualitative techniques to juxtapose, reconcile and understand alignment between leaders’ selves when viewed across time. Equally, while events may take place in time, individuals may use various temporal structures to frame their ongoing activities (Hernes and Schultz, 2020), requiring the researcher to explore leadership across time using various temporal structures. As such, from a QLR perspective, data collection intervals can be viewed as offering contemporary vignettes, i.e. perspectives of participants’ leadership development as viewed as a part of a whole, with said perspectives evolving with experiences to frame and reframe perceptions. Here the researcher’s role is to understand and contextualise various temporalities to transcend a purely chronological, positively grounded account focused on measuring leadership outcomes and competencies over time. In so doing, QLR can afford researchers, rich deep insights into the dynamics of leadership change and respond to recent calls for greater consideration of temporality in the dynamic nature of leadership (Castillo and Trinh, 2018).

2.2 The challenges associated with QLR

The challenges facing the qualitative longitudinal researcher are perhaps best viewed in terms of the addition of a temporal dimension or “temporal sensitivity” (Thomson and Holland, 2003) to those challenges facing qualitative researchers in general. In short, while the standard demands for rigour or trustworthiness (Lincoln *et al.*, 2011) are similarly levied at qualitative longitudinal researchers; the passage of time introduces additional factors into the equation such as: sample attrition, participant conditioning, and the need for greater reflexivity on behalf of the researcher. This section discusses these issues in relation to QLR in general, and where appropriate, for follow-up studies.

2.2.1 Trustworthiness. One major advantage of QLR is the flexibility it allows with respect to sampling, methods, units of analysis and theorisation (Takhar-Lail and Chitakunye, 2015). While this built in mechanism for change is clearly advantageous in allowing the researcher to respond to innovation in an iterative and flexible fashion; it brings with it even greater demands to substantiate claims for trustworthiness. As in the case of all qualitative research, the four key elements of trustworthiness: credibility, dependability, confirmability and transferability (Lincoln *et al.*, 2018), come under scrutiny. For QLR researchers however, the importance of contextualisation, laying out the audit trail (Rodgers and Cowles, 1993) and reflexivity (on behalf of both researcher and participant) must be afforded greater priority in view of the temporal nature of all research outcomes. The contributions of Pye (2001, 2002) are particularly insightful (and singular) with respect to the feasibility of replication or consistency in a follow-up study. Pye suggests, while the core focus of the study may remain the same, there are a number of reasons why the second study cannot repeat the first. These include changes in the environmental context, the organisational context and a switch of emphasis in terms of the prevailing explanatory and interpretative frameworks.

2.2.2 Sample attrition. Sample attrition is one of the main issues associated with the longitudinal time lapse (Holland, 2007). This is particularly true of studies where there are a small number of participants and loss of even one can adversely affect the overall balance of the sample in terms of key baseline sampling criteria. Sample attrition occurs for a variety of reasons, such as refusal to participate, changes in location or occupation, or, in extreme cases, death. For this reason, in panel studies, where there is an intention to re-interview some form of tracking device or strategy to maintain contact is advised (Tarris, 2000). In follow-up studies, where the decision to return to a research sample is more emergent than intended, the likelihood that some of these respondents will have vacated organisations, or positions is greater, particularly when there is a lengthy time lapse (Pye, 2001, 2002). Nevertheless, previous work by Galloway *et al.* (2015) highlights how QLR approaches can offer means of maintaining participant engagement and combatting attrition rates of more positivist-oriented survey work in entrepreneurial research, while uncovering more substantial depth in findings.

2.2.3 Managing the effects of the research intervention on the researched. The longitudinal design complicates the already complex boundaries of a research relationship. Extending the research relationship over time encourages a high level of reflexivity on behalf of the researcher and the researched and therefore analytical attention must be given to the effects of the research intervention on both (Takhar-Lail and Chitakunye, 2015). Heretofore, the research methods literature afforded greater attention to the effect of the research process on the researched, as opposed to the researcher, highlighting a number of ways in which research participants can be affected by the nature of the longitudinal relationship. For example, in prospective longitudinal studies where one returns to the original sample, responses can be conditioned or influenced by the previous research wave, particularly where the waves are close together, or where participants are privy to their original responses. Respondents themselves can also be altered as a result of their research involvement, indeed a number of studies highlight examples of participants feeling special, important or chosen as a result of the extension in

the normal research relationship (Thomson and Holland, 2003). Furthermore, the normative effects of the repeat interview format are seen to encourage or set expectations of narratives of progress or development; aware that the researcher has a record of where the respondent was in terms of life stage or career development at an earlier point in time, there is oftentimes a perceived pressure to be seen to have progressed (McGrellis, S. (2002)).

2.2.4 Researcher reflexivity. While heretofore, less attention was directed towards the impact of the research process on the researcher, in recent times this is less so, particularly with respect to longitudinal studies. Lucey *et al.* (2003) see the researcher as a key component of the research data generated by longitudinal approaches, recommending the inclusion of the researcher and their interpretations into what counts as data. Other researchers have commented on the therapeutic potential of the research interview and QLR (Lowes and Paul, 2006; Murray *et al.*, 2009), whilst cautioning about role confusion and boundary issues when it comes to researchers taking on the role of therapists or counsellors (Grinyer, 2004). Keeping a reflective research diary is strongly recommended as a means of explicating the researcher's thought processes and emotions throughout the process (Denzin and Lincoln, 2011).

As stated in the introduction, the empirical evidence for this article is drawn from a qualitative study into the content and process dimensions of leaders' personal knowledge. While it was not the researcher's original intention, for reasons primarily driven by changes in the macro environment, a sample of twelve leaders originally interviewed in the late 1990s were tracked down and re-interviewed in the late 2000s. In this respect, the research design is true to the format of a "follow-up" study as per the description provided by Holland (2007). A detailed account of this research design is provided in the section that follows.

3. Research method

3.1 Research design

The insights reported upon here are based on a research project that evolved from an exploratory study that examined the content and process dimensions of leaders' personal knowledge, into a follow-up study that sought to examine how these variables had changed over time. A third wave focused on permanent leadership exit, addressing the emotions that surface for senior leaders as they navigate and negotiate permanent exit transition. For this reason, the account provided is presented in terms of three separate waves of the study, as suggested in the QLR literature (Holland *et al.*, 2006). Of note, all interviews were conducted by the first author.

3.1.1 Wave one. The original research sample was purposeful, criterion based and convenient (Lincoln and Guba, 1985; Patton, 2002). Individual research participants were selected on their ability to shed light on the issues considered central to the research purpose; not for any 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 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 inclusion of parameters relating to leadership experience ensured participants had settled into their leadership role and that they had spent sufficient time in a leadership capacity to allow for reflection (Sherlock and Nathan, 2008). The sample was convenient in terms of access and the proximity of the research sites to the researcher. The final research sample, judged sufficient in size based on theoretical sampling (Patton, 2002), 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 provides the profile of the research participants across the three waves.

Table 1. A profile of the research participants

Participant	Position	Industry/Sector	Years in role wave 1 (1997)	Years in role wave 2 (2007–2009)	Years in role wave 3 (2021)
Adam	Bishop	Religious	9	Recently retired	Deceased
Bernie	Managing Director	Engineering design software	7	17	31 years
Carol	Managing Director	Consultant engineering	3	13	Retired
Donald	Director	Creative/cultural	7	17	Fired 3 years before
Eric	Managing Director	Brewery	9	Changed into new leadership role	Retired
Francis	Curator	Creative/Arts	7	Managing director	Retired
Gerald	Senior Manager	Public sector	4	Recently retired	Unavailable for interview
Henry	CEO	Not for profit charity	15	Recently retired	Deceased
Ina	Managing Director	Family business home heating	20	Changed role	Retired
Jack	CEO	Publishing	4	Retired but acting as chairman	Retired
Ken	Party Leader	Political	10	Role change	Retired and unavailable for interview
Liam	Professor	Education	4	14	28 years

Source(s): Authors' own work

The 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. The interviews lasted between one and one and a half hours and all interviews were transcribed verbatim. Field notes taken during each interview and written up immediately after were used to supplement the interview data. Each participant was sent a summary analysis of their interview for commentary and, on completion of the study, a copy of the analysis of findings at an aggregate level.

3.1.2 Wave two. The idea of returning to the original research participants emerged ten years after the original 1997 study. In 2007, in the midst of the ever-burgeoning knowledge economy (Uhl-Bien *et al.*, 2007) the demise of the Irish Celtic Tiger, a proliferation of corporate corruption cases and the collapse of the stronghold of the Catholic Church, the environment within which Irish leaders were operating had changed beyond recognition. For these reasons it appeared opportune to explore what (if any), changes had occurred in their knowledge requirements, the processes associated with those changes, and the contextual factors that accounted for them. The follow-up study was driven by two research questions:

RQ1. How have the content of leader's knowledge and the process of leader's knowing (or not-knowing) evolved?

RQ2. What contextual factors appear to account for these changes?

The purpose of this paper is not to address these questions *per se*; these have been dealt with elsewhere. As previously emphasised, the main aim of this paper is to highlight the challenges involved in conducting a follow-up study, based on the author's personal experience of and reflections on using this methodology. This was a time-consuming process. A number of the participants proved difficult to trace, one had set up a new business, two had changed the location of their business and four had retired (of which, two had re-located, one within Ireland

and one overseas). In terms of locating participants, gaining agreement for re-interview and conducting the actual interviews, the entire process took approximately two years to complete. Yet again, each participant was sent a summary analysis of their second interview for commentary as part of a sense-checking exercise.

3.1.3 Wave three. The third wave of data collection was conducted in 2021, representing a 24-year longitudinal span from the initial interviews. This phase was initiated as part of a broader research project examining leadership emotions following permanent organisational exit. Of the original cohort, only two participants remained professionally active, with one (Liam) retiring during the week of the final interview. Sample attrition occurred through mortality ($n = 2$) and loss of contact ($n = 2$), resulting in eight participants engaging in the 2021 follow-up study.

The established researcher-participant relationships, developed over multiple waves of data collection, facilitated what [Saldana \(2003\)](#) terms as enhanced disclosure through familiarity. This proved particularly valuable in eliciting vulnerable narratives surrounding participants' leadership exit experiences. The methodological approach employed semi-structured interviews with open-ended questions designed to probe participants' lived experiences, including: "What do/did you value most in your role as leader?", "What has your experience as a senior leader taught you about yourself?", and "What does/did leaving this role permanently mean to you?" While the protocol maintained conversational flexibility to facilitate in-depth participant reflection, we deliberately avoided direct emotional inquiry. Instead, following [Fineman's \(2003\)](#) methodological guidance, we employed critical incident techniques to naturally elicit emotional narratives, allowing affective elements to emerge organically through participants' retrospective sense-making processes.

Given the established relationships between the lead researcher and participants and the temporal dimension of the lead researcher's data collection we are cognisant of the potential for bias which may arise when reflecting on the methodological considerations outlined. To this end, peer debriefing was undertaken by the lead researcher and their co-authors. As [Creswell and Miller \(2000, p. 129\)](#) assert "*a peer reviewer provides support, plays devil's advocate, challenges the researchers' assumptions, pushes the researchers to the next step methodologically, and asks hard questions about methods and interpretations*". Through this peer debriefing process, the researcher's experiences, perspectives and viewpoints were challenged to ensure an honest, unfiltered account of the data collection challenges arising from this approach.

4. Findings

While the previous section provides an account of the "mechanics" of the research design, this section brings to the fore the researchers' personal experiences of conducting a follow-up study. These are discussed in terms of issues common to any research project: establishing the research parameters; managing and analysing a complex data set and factoring in the researcher-participant dynamic.

4.1 Establishing the research parameters

4.1.1 The research sample. The unintended addition of a second wave of data collection to the original 1997 study was primarily driven by exogenous changes in the political, economic, social and technological environments within which these leaders operated. Thus, from the outset, the researcher was clear that the purpose of the follow-up study was not to confirm participants original sentiments (albeit that this confirmation would be welcomed if it occurred), but rather to capture whether, and if so how, and why, their knowledge had changed in the intervening time period. The emphasis in terms of sample selection was placed on the individual, as opposed to the role occupied, thus re-tracing and re-interviewing all of the original sample set became a priority. The extended time interval (at a minimum a decade),

between the original data collection wave and the intention to re-interview influenced the research design in at least three ways. First, as could be expected, the passage of time brings much change in the environment and the lives of those who live through that period. On re-connecting with “the original twelve”, the researcher discovered that many of these leaders were no longer in the positions occupied on first meeting them. Indeed, almost half of the original research sample had terminally exited their roles through retirement, while others now occupied different roles in their original organisation, or in entirely different organisations. In summary: five participants had exited their former role through involuntary retirement; one chief executive officer was in the preparatory stages of retirement; the family business was liquidated, and the former managing director (MD) had set up a new business and the art curator (due to a change in organisational governance), was now MD. During the third wave, only two participants were still in their roles, and Liam was due to retire the same week that the interview took place. At this point, it was only possible to interview 8 of the original 12.

Being faced with a research sample that was “the same, but different” created a dilemma for the researcher. The “cross-roads” provides a useful metaphor for this juncture; the options being, to continue with the original sample or to seek out and include the new “replacement leaders”. The decision to go with the former for wave 2 was based on the researcher’s desire to remain true to the original research focus, broadly speaking, to examine knowledge/knowing at the personal or individual level. To introduce new people into the sample, would the researcher felt, contaminate the original sample set and take the research in a different direction. Although the researcher remained cognisant of the fact that many of their respondents were no longer “leaders” *per se*, the opportunity to gain insight into the changed nature of a leader’s personal knowledge as they transition out of and move beyond the leadership role and its related identity appeared an unexplored and exciting avenue for further investigation. This viewpoint was also taken for wave three. The focus of the study had shifted, this time to role exit from a leadership role and the associated emotions that this process entailed.

4.1.2 Timing. Another challenge faced by the researcher related to the precise timing of the research interviews. While the initial intention was to re-interview all the original research participants at a precise interval of ten years, this was not feasible for a number of reasons. These included: tracking difficulties due to job changes and relocation (in one case the researcher had to travel overseas to meet with the respondent), response delays that required several reminders, and re-scheduling of interviews due to the respondents’ busy schedules. While the entire sample was eventually traced, this took almost three years. While this resulted in a longer interval between first and second round interviews for four of the twelve participants, the researcher judged this more favourable than an incomplete sample. This issue was heightened for the third wave. Using the Internet, it became evident that two leaders had passed on, and two more were untraceable. Once again, a decision was made not to expand the sample on the basis that the time interval was considered a positive variable in the study.

4.1.3 The focus of inquiry. The third challenge in terms of the research design related to the overall focus of inquiry. As indicated earlier, while the intention was to retain the original research focus, broadly stated as: What do you need to know in the role you occupy? How do you know it? – in view of the extended interval between the two research waves, and the longitudinal desire to capture the changes that occurred over *time*, certain changes in the research focus were deemed necessary. The italicisation of *time* here is a deliberate attempt to emphasise the overall importance of this variable in a follow-up study. As time can be conceived of in many ways (objective time, absolute time or clock time; versus subjective time or relative time), a key concern at the outset was to understand the way time was conceived by the research respondents. The interviewer adopted three perspectives on time: “objective time”, “subjective time” and “event time”. In adopting these approaches 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.

In view of the fact that most significant events entail or engender some form of change, greater emphasis was placed on collecting significant events or “critical incidents” (Flanagan, 1954). 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 does leaving this role permanently mean to you?

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 they 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 examined in the section that follows.

4.2 Managing and analysing a complex data set

4.2.1 Shifting time frames. The data analysis stage presented significant challenges on several fronts. First, there was the presence of different timeframes. Once again, in view of the extended time interval between the first, second and third research waves, events that were described as “the past” in the first-round interviews, were in the distant past in the second and third waves. Events that were current in the first interviews, “were in the past” in the second, and events that were in the future in the second wave, became the present or “recent past” at the third 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 to the past in the first and second interviews, and were really in the distant past in the third. For the researcher, factoring in these “shifting” time frames was one of the most difficult aspects of this approach. Constructing individual chronological narratives for each of the research participants that reflected all time periods proved a useful reference point in this regard, as did visually mapping out the various events for each respondent in terms of the past, present and future over the research waves.

4.2.2 The passage of time. The extended time interval that was a feature of this study resulted in significant changes in three contextual variables: the macro environment encapsulating political, economic, socio-cultural and technological change, participants’ professional circumstances and their personal lives. The findings in this respect have been elaborated upon elsewhere; the intention here is not to re-hash these findings, but to draw upon them for illustrative purposes.

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 coincided with the beginning of the economic downturn. With the economy in decline, participants spoke of an altogether more competitive marketplace and a more informed and demanding customer or client. During the third wave it was clear that this occurred in the midst of significant

legislative increases and unprecedented advances in technology that encouraged on-line business and social media.

From a social perspective, all these changes were occurring within a society that was becoming increasingly hostile and sceptical as former bulwarks of respectability (such as the Catholic Church, the banks and government offices), collapsed under claims of abuse, incidents of corruption and fraud.

Of 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. As previously alluded to, 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.

On a personal front, the fact that these leaders were at least ten years older at the point of re-interview for the second wave is a change that is common to all participants. Now living their lives amid 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 ethics, values and their own mortality. This became even more prominent during the third wave. In a similar vein the sources of their learning and emotions 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 and third interviews over half of the participants spoke about what they had learned from their children.

4.3 Understanding the researcher-participant dynamic

The process of interviewing and re-interviewing these leaders doubtlessly impacted on the research output. From notes made in their research diary and peer debriefing undertaken between the lead researcher and their co-author, the lead researcher identified several roles they played, sentiments they believed their participants were feeling and thoughts on the overall impact of the longitudinal journey on both parties. The following sections provide a first-hand reflection on their role and the researcher-participant dynamics.

4.3.1 The researcher as confident, therapist or friend. In many respects, the experience of interviewing these leaders was entirely different the second and third time around. Firstly, there was a degree of familiarity that had not previously existed; having met before, I was no longer a total stranger. Having contacted respondents more than once by phone or email prior to each interview, we had established some form of a relationship. Placed into the context of their past lives, I was returning, not arriving and there was an evident difference. This familiarity engendered a reduction in the degree of formality previously afforded to the occasion. For instance, three of the interviews were conducted in the participant's home (indeed, the bishop invited me to partake of lunch with himself and his wife), and one participant asked that we meet for coffee in a local pub. Overall, I had a strong sense that these individuals were more at ease, that somehow they felt more secure in revealing the reality of their lives as opposed to, perhaps what they thought I wanted to hear.

Evidence to support this observation was contained in the content of the second and third interviews. For the most part, the accounts provided took the form of stories, the story of their lives as leaders and the impact of the leader life on their personal life and associated emotions. In this vein they related life-changing events 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 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. Furthermore, as previously mentioned, the fact that many of these leaders were coming close to the end of their careers in wave two and at retirement in wave three 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 in the second interview 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” (Former MD of family business); “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” (Theatre Director).

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 and indeed third time around I felt I was getting closer to the “real” person behind the job title. In this vein, these leaders appeared comfortable relating personal accounts of difficulties with children, 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, remarking: “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, 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. In the third interview, the participants spoke of loss of authority, marginalisation within the role at prior to exit, and a slow death with mortality coming to mind.

4.3.2 Participation encouraged by a sense of curiosity or intrigue. While sample attrition is common in longitudinal research, and although 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 a decade and then another 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 sent 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 because 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. Interestingly, there were not requests for transcripts for the third wave of interviews.

Taking both arguments into account, the researcher adopted a middle ground. While the researcher did not give the transcript prior to interview (which had already been circulated), they did promise that they would, once the second interview was complete. This promise of the transcript to some extent fuelled the curiosity and intrigue. In addition, excerpts from the first interview were fed back to the participant at some point during the second and third interviews. 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.

4.3.3 Participation encouraged by guilt. As this research progressed, to some extent it became a joint endeavour, particularly in the second wave. 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 in the way of that”. 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 researcher from the university”.

4.3.4 Participation encouraged by belonging – the virtual community. The idea of re-visiting a research sample after an interval of ten years and then a further ten years appeared somewhat unusual and intriguing to the research participants. Several times over the course of re-interviewing I was asked, how many of the original group I had succeeded in tracking down and how many had agreed to be interviewed. In drawing them into my research which required equal input from all of them, the research participants had taken on the characteristics of a group, they had a shared purpose. As indicated in the preceding paragraph, with this shared purpose came a burden of guilt, these individuals had become links in a chain that they did not want to break. Not only did they owe something to me, but it would also appear that they owed something to one another. What is more interesting here is the fact that, for the most part, most of the participants were unaware of who else was in this select group. Although some of them had come into contact in an executive development programme held at my university; at most (because they asked), only two or three of them were aware that the sample set was largely drawn from this pool. Over the course of the study, the participants never came together, while they remained linked, this link was virtual.

4.3.5 The longitudinal effect on the researcher. The extended time interval that occurred between the first, second and third phases of this research resulted in significant changes, not only in the lives of the researched, but also in the life of the researcher. The following excerpt from the author’s research diary reflects on these changes:

Coming to the end of this research 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 and third time around. When I began this research, I was a young, single, childless, non-mortgaged 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 (Yeats, 1916).

This excerpt highlights an important aspect of any longitudinal journey; in the end 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, our children grow up, we move forward in our careers, lose those who are dear to us and face our own mortality. Throughout the second and third 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 around much nicer people than when first we met”. 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 this 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 allowed it to surface before? Or perhaps they were responding to something they now saw in me?

5. Discussion

While the primary aim of this paper is to highlight the challenges that are associated with doing a follow-up study in particular, the authors are aware, it could be suggested these challenges are like those experienced by qualitative longitudinal researchers in general. In view of this, the important issue here is not the findings *per se*, but rather, the insight they provide on the challenges that are *amplified* by returning to the *same* research sample. These are presented in terms of the author’s 4Cs framework of follow-up inquiry. This framework encapsulates the researchers’ learning on the struggle for consistency, the necessity for contextualisation, coping with complexity and understanding connectivity. While the timeline of this study, 24 years, represents a protracted data collection period, the challenges highlighted below were evident between the various data collection stages, and as such, this framework is not a function of the data collection timeline outlined here alone but rather serves as a broader set of considerations to be noted by QLR researchers re-engaging participants.

We structure the 4Cs Framework along three stages in the data collection process, participant recruitment, data collection and data analysis (see Figure 1). Although initially linear, in follow-up studies the researcher is forced to look both back and forward in time, reflecting the iterative nature of QLR. Connectivity as outlined below is crucial in re-recruitment of participants, whereas the challenges of maintaining consistency and contextualising participant experiences over and within time are most prominent at the data collection stage. Complexity arising with multiple different temporalities is a key feature of QLR as researchers seek to make sense and give voice to the inherent complexity of the data sets which emerge. The following sections detail the 4Cs and the implications these give rise to for researchers undertaking QLR.

5.1 Consistency

As described earlier, in follow-up studies, while repeat interviews are not initially planned, for reasons relating to various exogenous changes, a pre-existing sample is tracked down and re-interviewed to chart changes in circumstances and participants’ perceptions of these changes. The absence of any prior intention to re-interview is a distinct and important characteristic of the follow-up study. Unlike other prospective studies which may have some form of contact or

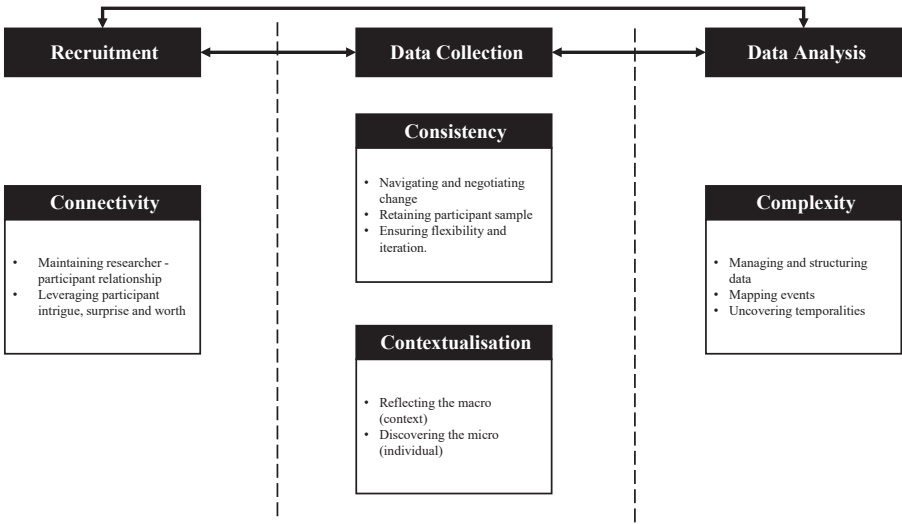


Figure 1. The 4Cs framework of follow-up inquiry. Source: Authors’ own work

tracking system in place throughout the intervening period, the follow-up study necessitates the revival of an estranged relationship. This, the researcher discovered, creates difficulties and time delays in terms of tracing, scheduling and encouraging respondents' co-operation. While the researcher was eventually successful in returning to the entire sample for the second wave, in terms of consistency, the overall findings concur with those of [Pye \(2002, p. 909\)](#): who, in quoting the Heraclitean proverb: "You cannot step into the same river twice," concludes it is not possible to repeat a piece of research after a lengthy time interval.

While the sample remained intact, the nature of that sample and the context within which they were revisited was entirely different. The contextual changes uncovered in the macro and organisational environment are similar in many respects to those identified by Pye. The research findings are also supportive of Pye's assertion that a lengthy interval may result in changes in the interpretive and analytical frameworks that were current in former times. While more detail on this aspect of the research is provided elsewhere, the account provided here signals the changed nature of the knowledge that was prioritised in the second research wave. Such knowledge reflects much of what is now understood as compassionate leadership ([Ramachandran et al., 2024](#)). This change in emphasis or orientation may in some part represent an attempt by these leaders to validate their own actions and decisions, or to separate themselves off from an environment that is rife with declining morals and values, increased corruption and abuse of power. In another part, it may reflect the exposure of at least three members of the sample to current thinking in leadership through involvement in further studies. The third study focused on emotions and our findings first reveal the salience of loss post exit which entailed tangible loss, including loss of monetary rewards, structure, routine, and relationships; and intangible loss, of identity and a dilution of power that manifests in marginalisation and isolation. In all, the findings reflect Pye's assertion, the prevailing interpretive frameworks have changed and in many respects these changes are reflected in participants' responses.

While in general terms the researcher's experience of doing a follow-up study supports Pye's assertion that "you cannot re-do a study" there are some divergences between their findings and those of Pye's. These are chiefly related to the difference in our approach to sampling. While Pye's sample changed to incorporate the changed context, this researcher opted for an enduring sample. While Pye argues that continuity makes more sense for the researcher, than for organisations that rarely exhibit such continuity; the researcher suggests their decision to return to the same sample (despite the changed nature of that sample), is true to the spirit of QLR which encourages flexibility, iteration and change. Indeed, returning to the same sample brought forth greater insights into aspects of the leadership literature such as role exit, where to date there has been a paucity of empirical research.

5.2 Contextualisation

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. In this respect, the research finding confirm [Farrall's \(2006\)](#) assertion that one of the central advantages of QLR, is 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. The researcher's experience concurs with this assertion. The findings illustrate the impact of the external environment on these leaders' professional circumstances (at an organisational and individual level), whilst also providing examples of how 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 was somewhat problematic. While the researcher recognised this difficulty, their intimate knowledge of the research data (based

on the in-depth nature of their analysis), allowed them 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.

5.3 Complexity

While many researchers speak of “drowning in data” at the analysis stage of a qualitative research project; the potential for this is amplified in a longitudinal design. In addition to the sheer volume of data, the introduction of temporality and the presence of shifting time zones multiply the degree of complexity the researcher faces. For the follow-up researcher a key issue is to understand time from the participant’s point of view. In this respect the research findings highlight the necessity to take a relativist approach to time as recommended by [Ancona et al. \(2001\)](#) and to capture change over time using critical incidents ([Flanagan, 1954](#)).

5.4 Connectivity

While familiarity is a feature of any prospective longitudinal study, the research findings suggest this is intensified in a follow-up study. Not only was the researcher brought into contact with the same participants, but the fact that this reunion was not part of the original research contract, brought elements of surprise, intrigue and feelings of being sufficiently special or important as to warrant a return visit. While the researcher-participant relationship in QLR has been examined by others ([Saldana, 2003](#)); the author is not aware of another paper which specifically examines the researcher-participant relationship in follow-up study. An unusual aspect of this relationship that emerged was the existence of the virtual group, and the multiple connections in a research project between the researcher and the research participants and the research participants and their co-participants.

6. Conclusion/implications

In documenting their experience of both the mechanics of conducting a follow-up study and their personal reflections on this process, this paper contributes to a nascent conversation in the research methods literature on process-related issues ([Sergi and Hallin, 2011](#)). As [Hassett and Paavilainen-Mäntymäki \(2013\)](#) note, there is a need for researcher accounts into the experiences surrounding the design and implementation of QLR. In moving into this domain, this research addresses requests for qualitative research that takes a more reflexive ([Finlay, 2002](#)), auto-ethnographic ([Le Roux, 2017](#)) or storytelling approach ([Gabriel, 2018](#)).

Through their honest and upfront account of the emergent nature of their research design, this paper addresses recent criticisms that suggest in the pursuit of “good science” oftentimes we confine to the margins, or discard entirely, that which is real and honest about our research endeavours; the “lived experience” and the “messiness” of actually doing it ([Cole, 2013](#); [Donnelly et al., 2013](#)). 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 et al., 2013](#)).

A number of practical challenges in QLR were identified, including the difficulties in maintaining contact with participants over multiple rounds of data collection. Although issues around maintaining contact, currency and awareness of participants’ professional shifts over time were pronounced given the duration of data collection, many of these challenges may be increasingly present for QLR researchers working over shorter time periods owing to factors such as employee mobility, job and location switching and so forth. As such, looking forward, while the rise of professional networks such as LinkedIn, may afford QLR organisation researchers opportunities in both supporting re-recruitment, and gaining rich contextual insights on an ongoing basis through netnographic approaches, they present multiple

questions regarding potential bias and research ethics which are not currently fully understood. These require further consideration within the QLR literature.

In greater pursuit of further developing QLR, we need to refocus our agenda for ensuring rigour in qualitative inquiry, placing as much emphasis on “thick performance” (Sergi and Hallin, 2011) as we have heretofore placed on “thick description” (Geertz, 1973). The researcher’s 4C’s framework represents one small contribution to this change.

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