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Capturing change and stability in longitudinal qualitative research: insights from a study about aging and life transitions in Israeli continuing care retirement communities

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ABSTRACT

The present paper considers the use of longitudinal qualitative research (LQR) as a means to capture both change and stability in people's lives. We use an LQR study conducted in continuing care retirement communities to demonstrate three dimensions that should be taken into consideration when addressing change vs. stability. Three waves of interviews with older adults and their family members as well as memos and reflections concerning interview data are used. The first dimension concerns the question of: "*who defines change?*" A second dimension raises the question of, "*what has changed?*" Finally, a third dimension concerns the *timeframe* of change. We argue that LQR provides a tremendous richness of time dimensions and perspectives. Discrepancies between dimensions, perspectives and timeframes can be particularly enriching. Moreover, LQR allows also for the opportunity to examine stability.

Introduction

Time and change have long captured the imagination and interest of gerontologists because change is thought to be embedded in the aging process. For example, the life course perspective, has remained prominent in both classic and contemporary gerontology theorizing (Elder & Rockwell, 1979; Elder Jr, Johnson, & Crosnoe, 2003). This perspective stresses the idea that human development and aging are lifelong processes, composed of both gains and losses over time (Baltes, 1987; Bengtson, Elder Jr, & Putney, 2012).

Gerontological researchers continue to think about how to advance knowledge about the life course in social, historical, cross-disciplinary, and cross-cultural ways, to name some (see Lynch & Danelly, 2013 for a good summary discussion of some of these approaches). Despite this progress, what has been explored in less detail in gerontological longitudinal qualitative research (LQR), to date, is how to better consider ways in which notions of change and stability are investigated (overall) and how the use of particular LQR research designs/strategies influences these processes. This is important given the inherent nature of life course perspective on time and the potential of an LQR method to enrich this perspective. In this study, we employ the definition proposed by Nevedal, Ayalon, and Briller (2018), which suggests that LQR involves the collection of two or more time points and the use of qualitative methods to capture and enhance understandings of time perspective and change over time.

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Purpose of the study

With this in mind, we will more closely explore how notions of change and stability were researched in a study of continuing care retirement communities (CCRCs) residents and their family members conducted in Israel. The main goal of the study was to examine intergenerational relationships over time, following the transition of older adults to a CCRC. It was hypothesized that over time, older adults would show greater adjustment to the new setting and as such, their relationships with family members take a different angle. The study is described in detail elsewhere (Ayalon, 2015, 2016, 2018; Ayalon & Green, 2012, 2015). In the present paper direct quotes from interviews are used to illustrate the multi-dimensional nature of LQR. Hence, the focus is not on the thematic analysis extensively described and detailed elsewhere (Ayalon, 2015, 2016, 2018; Ayalon & Green, 2012, 2015), but on ways to conceptualize the methodologies used in the framework of stability vs. change as captured in LQR.

When it comes to change over time, context matters; historical, social and cultural contexts, as well as individual autonomy, are thought to shape the aging process. The broader historical context and past historical experiences shape individuals' functioning, worldview, and interpersonal relationships within and outside the family (Bengtson, Elder, & Putney, 2012). In a similar manner, the principle of linked-lives suggests that the lives of family members are inter-linked so that they influence each other (Bengtson et al., 2012). It is thought that the individual's behavior within the family can be partially attributed to this person's chronological age as well as to the chronological ages of other family members. However, chronological age is only one factor that should be taken into consideration when considering one's life course trajectories (Bengtson & Allen, 1993).

In the field of gerontology, theories on time have moved away from a general time perspective (Nydegger, 1986), widely shared by one's society, to examine the particularities of time and change. For instance, specialized timetables refer to social contexts as being responsible for some of the variations in the perception of life stages. These social contexts include, but are not limited to, various forms of social inequality, such as age, gender, or socioeconomic status. Even though these timetables are not shared by all, they are shared by certain segments of the population. Personal timetables, on the other hand, emphasize the individual's own unique experiences, which are not necessarily in accordance with general or specialized timetables. Finally, interdependent timetables refer to the mutual influences between individuals' life course trajectories (Nydegger, 1986).

Whereas these theories outlined above address changes over the life course and offer a contextualized framework to examine time, other prominent theories have regarded stability as an inevitable part of the aging process. For instance, the continuity theory argues that continuity rather than change is adaptive for middle-aged and older adults, who strive to maintain stable both internal and external experiences (Atchley, 1989). Consistent with the continuity theory, the successful aging theory views successful aging as a continuation of middle-age (Rowe & Kahn, 1987). These theories clearly demonstrate that gerontologists have had a long-standing interest not only in change, but also in stability, as ways to conceptualize old age and the aging process.

In order to capture time, change and stability in old age, one has to move away from studying chronological age, *per se*. Instead, multiple contexts and intersections should become the focus. Qualitative research is particularly appropriate for such a task as it is designed to capture the deep meaning ingrained in human life. LQR is desired given the interest in change over time and the processes which underline these changes (Holland, Thomson, & Henderson, 2006). The non-linear features of LQR, which account for context and complexity are vital for the study of complex phenomena, such as time and change or stability over time.

The growing body of research on LQR has stressed the complexity in its design and analysis (Thomson & Holland, 2003). Past research struggled with the definition of LQR (Farrall, 2006), with some arguing for LQR as being long in nature, proposing a minimum of data collection of nine months, yet acknowledging variability based on research focus (Saldaña, 2003). However, others have suggested that LQR can spread over a short period of data collection, as long as the

notion of time is incorporated into the analysis (Nevedal et al., 2018). A wide array of studies stress practical aspects related to LQR, such as the recruitment and retention of participants (Calman, Brunton, & Molassiotis, 2013) or theoretical and methodological issues concerning the analysis of LQR (Holland, 2007; Neale & Flowerdew, 2003; Thomson & Holland, 2003). A recent qualitative evidence synthesis has identified 71 LQR articles from 47 different journals. These articles were quite diverse in terms of the contexts they addressed and the methodology used (Nevedal et al., 2018).

The present paper aims to capitalize on existing longitudinal qualitative data collected over three waves of interviews (Ayalon, 2015, 2016, 2018; Ayalon & Green, 2012, 2015) to draw attention to various sources of change and stability in LQR. Given the complexity which characterizes LQR, we argue that there is a need to pay greater attention to various sources of change and stability, which go beyond the chronological passage of time and beyond changes in the reported experiences of our interviewees.

Methods

The context

The conceptualization of LQR change and stability used here is based on a three-wave study of CCRC residents and their family members conducted in Israel. In 2010, CCRC residents and their family members were first interviewed. The rationale for this first wave of interviews was to assess older residents and their family members following their transition to the CCRC. Only residents within the first year of their transition to the CCRC were interviewed because we wanted to capture initial adjustment to the CCRC. Following financial support from the Israel Science Foundation, additional waves of interviews were conducted and another group of residents that moved to the CCRC in 2013–2014 and their family members were recruited. This allowed for increasing the variability of CCRCs in the study. Residents and family members were followed in two additional waves of data collection, spread approximately 1 year apart. Interviews were conducted in a face-to-face format in the preferred location of interviewees. Overall, 59 older residents) 49 women, average age 80, SD = 4.7) and 36 adult children) 25 women, average age 54, SD = 7.6) were interviewed in wave one. These numbers declined in waves two (43, 28) and three (27, 21), respectively. Prior to approaching older residents, we consulted the social worker in each of the settings regarding their cognitive and health status. This is the first study to analyze data from the entire cohort, as prior studies relied on the analysis of ongoing data collection. The interview guide is provided in Appendix 1.

This three-wave sampling procedure, potentially allows for the assessment of change and stability following the transition to the CCRC (with data available between 6 months and up to 6 years from the transition). The longitudinal design was constructed to examine the hypothesis that over-time change is inevitable for older adults and their family members who embark on such a transition. Change was expected primarily because of the physical transition to a different location, which was hypothesized to bring additional social and mental changes.

Analysis

Relying on the framework analysis (Srivastava & Thomson, 2009), we a-priori identified main aspects of change and stability based on a previous review of the LQR literature (Nevedal et al., 2018). These domains were then explored in relation to the existing data collected over three waves of data. We followed the five steps offered by the framework analysis: (a) the familiarization with the data through reading and re-reading of each of the interviews; (b) the identification of a thematic topic, in this case, change and stability in LQR; (c) indexing refers to the selection of themes and topics in the interviews that correspond to the particular theme. Even though we had a-priori hypotheses about the nature of

change and stability as captured in LQR, we maintained an open approach to coding to incorporate additional themes, which were not necessarily foreseen in advance; (d) charting involves moving the themes from their original context and arranging them in charts to better present the data; and finally, (e) mapping of the findings was done to provide a schematic diagram that guides the interpretation of the data. In analyzing the data, we incorporated a flexible timeframe and allowed for the complexity inherited in analyzing multiple waves of data collection (Holland, 2007; Neale & Flowerdew, 2003; Thomson & Holland, 2003). We also considered memos and all other forms of personal reflection in the interpretation of the findings.

Findings

Capturing change vs. stability

In the present paper, we propose an elaborated perspective on sources of change and stability in LQR. We argue that in order to more fully understand the rich data obtained via LQR, one has to become aware of multiple sources of variability and change and, at the same time, remain open to stability. Although the following sections are devoted primarily to change as captured and produced by LQR, we argue that stability in LQR is also multifaceted and should be acknowledged.

Figure 1 provides a pictorial illustration of the three dimensions along which, change and stability are conceptualized in this study. We propose that change and stability can be conceptualized along three major dimensions. We first detail the three dimensions and subsequently rely on examples from interviews with CCRC residents and their family members to illustrate these claims.

The first dimension attempts to address the question of: “*who defines change vs. stability?*” We argue that change can be reported by the interviewee, other people in the interviewee’s environment, the interviewer, or the person who analyzes or reads the data. Each of these stakeholders can explicitly or implicitly acknowledge change or endorse stability over time and disagreements between these stakeholders might occur. Although this domain is not different from other types of qualitative analysis, the difference here concerns that fact that time has to be accounted for as a potential influencer of the interpretation of the findings.

A second dimension for defining change vs. stability in LQR raises the question of, “*what has changed?*” Change is acknowledged in interview data when the same topic is discussed in different ways or when different topics or new topics are introduced over time. Change can take multiple

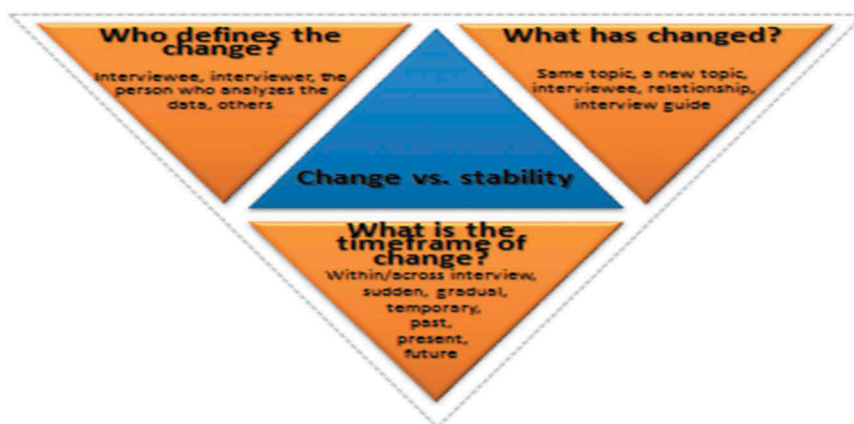


Figure 1. A conceptual framework of change and stability in longitudinal qualitative research.

forms. Change can represent cultural, mental, physical, social, or environmental aspects related to the interviewee. Change does not only pertain to the interviewee and his or her own surrounding, however. It can also be facilitated through a relationship with the interviewer, changes in the interview guide, or in the person who analyzes the data.

A third dimension of change concerns the *timeframe* of change. Change can occur within the same interview or across interviews. It can be sudden, gradual, over a long period of time, stable or temporary. Finally, change can be defined as occurring with respect to the past, present or the future. Hence, we proposed here a very flexible timeframe to review and define change and stability.

Who defines change?

The interviewee as the one who defines change

The most expected answer to the question “who defines change” would be “the interviewee.” By interviewing a person, we make an implicit assumption that this person is able to tell us something meaningful about his or her life events. We might specifically target individuals who are more observant than others to tell us about their lives, under the assumption that they are the best source for such information.

According to phenomenological theories (Giorgi, 1997), the interviewee is seen as the best source to teach us about his or her life and as such, the best person to identify and define change. The following statement made by an older resident provides a good example of how she herself was observant enough to report a change in her life, following her transition to the CCRC: *“My life has completely changed. I mean the first six months were a period of adjustment. It took me less than half a year to adjust. I was very well-received and I immediately became involved (with all the social activities at the CCRC).”*

The interviewee's social environment defines change

Change can also be perceived by others in the interviewee's social environment, rather than by the interviewee. In this case, change can be implicitly inferred from the respondent's reports. For instance, an older woman resident who was interviewed for this study commented on staff change of behaviors towards her. The behaviors reflected staff concerns that were fueled by her declining physical status, but she herself did not acknowledge her physical decline. A similar idea was expressed by a daughter of an older resident. The daughter had acknowledged the change in her mother and accepted it as a stable fact, whereas her parents viewed the change as temporary, *“she has not accepted the fact that she had a traumatic brain injury and my father hasn't either. He keeps telling me, ‘it will be alright, it will be alright.’ And I keep telling him, ‘this is not okay, this is irreversible, and it will not change.’”*

The person who analyzes the data defines the change

When interviewing older adults and their family members as part of the CCRC study, it became clear that at least some experiences or perceptions were hard for the interviewees to acknowledge. When listening uncritically to their explicit accounts, stability could be assumed by the listener; as many interviewees vocally expressed limited or no changes in their lives following the transition to the CCRC. However, once an hermeneutic (Laverty, 2003) approach was adopted, changes were easily inferred by the person who analyzes the data, even if denied by the interviewee.

The following account made by a son of a couple who just moved into the CCRC is a good example for this discrepancy between one's reports and the interpretation of the report: *“You know, they are both still completely balanced cognitively, and my mom is a tiger, she is 80 years old and my father is 82.”* Listening to this account, one is in full of admiration of these highly functioning older adults. However, several lines later, we are told that, *“there was this period that my mom, you know,*

my mom had all of a sudden and she had incontinence and she was lying down in bed for a long time.” Hence, even though the mother was initially portrayed as a tiger, her weaknesses were implicitly acknowledged in later stages of the interview. Yet, only a careful analysis of the interview transcripts can reveal this added perspective of change.

The interviewer defines change

Finally, the interviewer can be the person who defines the change. This can be done directly by asking respondents about changes over time. In the second wave of interviews of the CCRC study, each interview started by asking the interviewee “what has changed since the last interview.” Such an opening question leaves little room for stability and most respondents eagerly described the various aspects that have changed in their lives since they were last interviewed. This explicit request to talk about change clearly facilitates the acknowledgment of alterations in one’s life.

What has changed?

The interviewee and his or her environment have changed

In drafting the original proposal of this study, changes in the interviewee and his or her environment were envisioned as the main focus of the study. The study was specifically designed to assess change in older adults following their transition to the CCRC. Specifically, we (Nevedal et al., 2018) as well as others (Bekhet, Zauszniewski, & Nakhla, 2009; Branch, 1987) have found that the wish to maintain independence and autonomy and not to become a burden on the children represents a major incentive for moving to a CCRC. Thus, the transition to the CCRC reflects an external change initiated in order to avoid future internal changes in one’s self-concept as independent and in the relationships with adult children. Nonetheless, our findings demonstrate that with age and deteriorated health, physical, emotional and social changes have become inevitable (Ayalon, 2016).

During interviews, respondents acknowledged multiple changes in their lives. The following quote by a son, whose mother moved to a CCRC reflects his appreciation for the changes she has gone through: *“this (the transition to the CCRC) is a new project in her life. I told you, we lived in New York, we lived in Venezuela, we lived in Buenos Aires, we moved in and out of several apartments. It is a project. At this age, a new place, different mentality.”*

A different example can be illustrated by a woman resident who vividly described how her physical deterioration impacted her activity level and social life, *“the walks have gotten shorter because I am deteriorating, I am deteriorating. I can’t walk for half an hour, an hour any more. From six to seven, for sure not. I don’t even ask myself to leave before seven. And I have to be back by eight o’clock for breakfast.”*

Some residents have reported challenges in adapting their mental functioning to changes that have taken place in their lives. The following quote by an older resident described her need to adapt her mental age to her chronological age, *“my mental image has to go in accord with my chronological age. You have to learn to accept this and understand that you have to ask for less from life now and train yourself not to feel disappointed. I really think I am succeeding. I do not cry inside and when I wake up three times per night, I accept this.”*

Family relations too have changed, with some family members and older adults reporting an improvement in their relationship following the transition and others, pointing to the stress the transition has brought to the family. Yet, others reported on changes in the relationship with other family members as a result of intergenerational experiences of caregiving. The following quote by a son of one of the resident illustrates this: *“I went to my son and I told him, ‘I do not want you to go through the same problems I have with my parents. Dear son, I am giving you this note, the day I cannot drive anymore, I want you to take away the keys from me.”*

The relationship between the interviewee and the interviewer has changed over time

Qualitative research is relational. It includes at least two people, who construct and re-construct the data via their interaction (Tang, 2002). Although during the first wave of the CCRC study, interviews were conducted by several different interviewers, the majority of subsequent waves of interviews were conducted by a single interviewer. This resulted in the formation of a stronger bond between the interviewer and the interviewees. During interviews conducted in waves two and three, there were many indications for the formation of such a relationship between the interviewer and the interviewee. Compared with the first wave of interviews, on subsequent interviews (waves two or three), interviewees were more likely to directly approach the interviewer and ask him about his observations and perceptions of their own lives. They also expressed an interest in the interviewer, asking him for his age, profession and marital status. This direct interaction with and interest in the interviewer was not evident during the first wave of interviews. Hence, this attests to the changing role of the interviewer, from a potential “tool” that delivers research questions to facilitate a monologue to a real person who is interested in itself and whose presence elicits a dialogue.

The following statement made by one of the residents illustrates this, *“I am happy here (at the CCRC). I have lost 15 pounds. I don’t know if you have noticed this? Do you remember me at all?”* This explicit approach indicates the relative importance this interviewee placed on being remembered and acknowledged by the interviewer.

A different statement made by a son of one of the residents attests to the fact that the interview has become a source of change and that the opportunity to take part in an ongoing research study that requires one’s reflection and internal observation carries substantial effects and improves the interviewees’ retrospective abilities: *“I think I am comfortable (with parents’ transition) because I am conducting a research study on myself, thanks to you.”* This statement suggests that the interview has become a source of personal change and even growth.

Finally, conducting an LQR study that spreads over multiple waves also opens a possibility that responses that could have been perceived as being too intimate or revealing in wave one, were more easily discussed in waves two and three of the interviews, simply because of the formation of a relationship between interviewee and interviewer. What was rude or inappropriate among strangers might be very acceptable among people who have already met at length to discuss one’s life story in the past. Hence, it is possible that the interpretation and the response to the questions have changed, even if the questions themselves have not changed.

The interview guide has changed over time

In contrast to longitudinal quantitative research, which measures change through a direct comparison of exactly the same measures over time, LQR allows and at times even encourages changes in the interview guide over time. The idea is that interview data can guide and refine future waves of data collection (Nevedal et al., 2018). In the CCRC study, the interview guide has gone through several transformations over time. Whereas initially, interviews opened with the question *“tell me about the decision to move,”* it was subsequently rephrased as *“tell me your life story.”* The change in the interview guide, which started with such a broad question, was fueled by the wish to learn more about respondents’ lives and to better contextualize the transition in a broader context. This change brought with it greater openness and familiarity that often facilitated introspection on the part of interviewees.

Another change in the interview guide was the decision to explicitly ask about the nursing unit, which was often located within the CCRC, but was rarely talked about during the interviews. In the first wave of interviews, very few respondents spontaneously brought up the issue and when they did so, it was clear that this was a heavily loaded topic that was very difficult for them to address. As a result of this avoidance and given our interest in the topic, we specifically

asked about the nursing unit on subsequent interviews. The responses provided to this question made it clear that interviewees avoided the topic not only during the interview, but also in real life. The following discussion between one of the residents and the interviewer illustrates this:

Interviewer: *I saw that at the entrance there is also a nursing unit?*

Interviewee: *The nursing unit is totally different. It has a different entrance. And everything that belongs to the assisted living facility is on the first floor. Not ground floor, first floor. Our elevator that arrives here does not stop on the nursing unit. There is a completely different elevator on the outside of the area of the CCRC.*

Interviewer: *Is there any relationship between you and the nursing unit residents.*

Interviewee: *No. no. no. no...*

Interviewer: *No? Don't you collaborate on activities?*

Interviewee: *There is no entrance because the door is locked on a key.*

Although the attitudes of the interviewees toward the nursing unit might have stayed the same over time, the use of more direct questioning has changed the focus of the interview and resulted in additional information that we would not necessarily have obtained otherwise. Such a change in focus might have impacted the entire interview course as respondents were specifically directed to address issues they had attempted to refrain from. Similarly, whether or not one explicitly asks about change, also is likely to impact the ways change is discussed or not discussed.

The people who analyze the data have changed over time

The analysis of qualitative interviews is ongoing, requiring the repeated reading and re-reading of interview transcripts, while constantly comparing themes within and across interviews. The passage of time affects everyone. Hence, changes associated with the passage of time concern both the interviewees and the people who analyze the data. Over a period of several years, as is the case of the present CCRC study, it is highly likely that the people who analyzed the interview data have also gone through numerous changes, which likely have impacted their interpretation of the transcripts. Moreover, the mere reading of so many transcripts over and over again impacts the perception of the people who analyze the interviews so that a first encounter with the interview data will never resemble a second or a third encounter with the data.

What is the timeframe of change?

Change as measured within the same interview

Change over time can be manifested within a single interview. For instance, the interviewee can point to discrepancies between the current situation and the past, discrepancies can be identified within a single interview or they can be noted in relation to foreseen future changes.

Change is assessed in comparison to the past

Change can be discussed as a comparison between the present and the past. For instance, when describing his mother's adjustment to the CCRC, the son reflected within the same interview on his mother's return to her past drinking habits as a sign of adjustment:

She (mother) and my father used to drink whisky at five. Every day between four and five o'clock. Sometimes, she would drink at four and I would tell her, 'how come you are drinking at four?' and she would say, 'it is five o'clock somewhere in the world.' When she fell down, before she left her house, she stopped drinking whiskey. I knew she has reached home after three or four months in the CCRC, when one day she had asked me for a bottle of whiskey.

The statement incorporates the notion of time and explicitly points to a discrepancy between the present state and past affairs. It also provides an indication of the way the mood of the interviewee changes over the course of the interview.

Change is assessed in comparison to the present

An example of a change that occurs in the present, within a single interview, can be seen in the following dialogue between the interviewer and a daughter of one of the residents. In response to the interviewer's question about the terminology used to describe her father's living arrangement, the respondent stated: *"this is the first time I think about it. He doesn't call this place home or maybe he does. This is for sure his house."* This statement reflects the daughter's uneasiness and surprise to realize that her father might not be feeling as "at home" as she would have liked to think. It also reflects changes in one's perceptions of the situation brought by the interview.

Change is assessed in comparison to the future

Change can also be foreseen and predicted with regard to the future. In fact, many of the residents had moved to the CCRC with the realization that future changes are inevitable and that their physical health is likely to deteriorate. Hence, during interviews, the notion of change between the present state and the future was explicitly expressed. The following quote from an interview with a son of one of the residents reflects his expectation that the aging process is likely to change over time and to vary across generations: *"I am probably the last generation that can prepare for aging and know how my aging process will look like. I think your generation doesn't know what to expect. You will live to be 120, 130, or 140. I think there will be a change. Things we can't even imagine."*

The pace and frequency of change

The pace of change is also likely to vary. Change can be abrupt, as in the case following a sudden health decline or it can be gradual over a period of several months or years. The following statement made by a son illustrates how his parents' situation had changed abruptly, upon the introduction of a migrant home care worker in their lives: *"all of a sudden, there was someone in their house. And it is difficult. It is difficult for everyone, especially at this age. All of a sudden, someone enters their lives."* In contrast, the description of the adjustment process to the CCRC made by one of the residents reflects a much more subtle and ongoing change, *"for a long time (after leaving the CCRC), I missed It (old home and community). Now, I don't miss it any more. I missed my city. I missed it because I was used to it."*

Change as measured within vs. across interviews

A different way to identify change is by examining whether the same topic is discussed differently over time within the same interview and/or across interviews. Change can be manifested within a single interview, when new information is presented at different stages of the interview or it can be reported across interviews, when information is presented differently on different waves. These changes can be due to variations in perspective or recall, but can also be due to changes in mood or in the willingness to acknowledge certain issues. The following segments from a second interview with a resident who transitioned to the CCRC two years prior to the conduct of an interview illustrate this. This resident started the interview with multiple complaints about her aches and pains, *"I have had a very difficult year. I have had many aches and pains. Nothing I did helped. I have to live with this. That's what the doctor said."* Towards the end of the interview, when asked about her age-related expectations she said that her aging process has been relatively good and she refrained from mentioning her physical pains: *"so far, things are going well. I just hope I will stay*

healthy. There are people who are 102 years old here.” These discrepancies possibly provide an illustration of changes in the willingness to report, rather than in actual perceptions.

A different example demonstrates changes not within a single interview, but across interviews. In response to a question about the decision to move to a CCRC, one of the residents stated: *“in the end of the day, you do not live forever. We might need physicians, physiotherapists. All the things that are here. There is medical care and a nursing unit.”* Upon being interviewed a second time, four years later, the person explicitly expressed a wish not to go to a nursing unit, *“I pray we won’t have to go to a nursing unit. We even made our daughter sign a statement saying, we will not end up in a nursing unit.”* These contradictory quotes provide an illustration of a shift in the perception of the nursing unit as a reason to the move to the CCRC vs. the nursing unit as something one avoids at all costs.

Concluding comments: change vs. stability

As demonstrated by the CCRC examples in this paper, LQR poses a highly complex web of possibilities for the definition and framing of change vs. stability. Because change can be inferred via multiple stakeholders, timeframes and methods, congruence might not be the norm, but rather the exception. This argument has been articulated in the past. Researchers have stressed the non-linear nature of LQR when retrospective and prospective accounts interact to produce a complex and comprehensive view on change (McLeod, 2003). The various possibilities for the definition of time and change in LQR are contrasted with more positivistic approaches, which view time as progressing chronologically and clearly articulate the stakeholder/s and mechanism/s which define change throughout the study period (Singer & Willett, 2003).

The complexity of capturing the change in LQR is particularly evident when discrepancies occur. Whereas the interviewee might not acknowledge change, the person who conducts the analysis or others in the interviewee’s environment might be acutely aware of it or vice versa. Although this can enrich our understanding of the concept of change, it raises the inevitable question of whose view should we rely on and who should define and identify change. When reality is believed to be co-constructed by the interviewer, the interviewee, the person who analyzes the data and the reader (Mann, 2011), the tension between descriptive vs. interpretative analysis is intensified (Lopez & Willis, 2004). The researcher should be aware of these discrepancies and explicitly acknowledge the “perceiver” of the change at focus. We argue that especially when working with disempowered populations, such as older adults, it is important to acknowledge the multiple views or perspectives on change and stability.

It is essential for LQR, to acknowledge sources of change which are brought by the methods used. The methods used in longitudinal research have the potential to change over time. The interview guide, the interviewer, the relationship between the interviewer and the interviewee and the person who analyzes the data can all change. These sources of change are not necessarily the focus of the study. In fact, in most LQR studies, these aspects are not discussed and are regarded as a “non-issue” (Nevedal et al., 2018). Moreover, in quantitative research, these would be considered artifacts or sources of bias. Yet, in LQR these changes can be desired and encouraged if well justified. Hence, any LQR has to take these changes in methodology into consideration when interpreting the results. Oftentimes, these changes facilitate further changes in the interview or the interviewee’s perspective.

Finally, it is essential to acknowledge that stability, rather than change can be quite common. In most cases, the rationale for conducting LQR and incorporating time in the analysis stems from an interest in change. In our attempt to capture change, both our interview guide and our analysis were focused on change and discrepancies were actively sought out for. Nonetheless, many of the participants reported stability in their adjustment process over time. Some reported similarities not only in relation to recent events in their lives, but also in relation to more remote periods. Moreover, many times, stories were told in very similar forms over and over again, across waves. Continuity and stability are often present and should receive consideration even when change is

sought after and analyzed. These arguments should be viewed in the context of the quantitative search for statistically significant findings. Quantitative researchers have long realized that most studies are likely to find their way to the file drawer rather than to a peer-reviewed journal, given the focus on statistical significance (Rosenthal, 1979), e.g., change in the case of longitudinal research. Because LQR allows for greater complexity of perspectives and dimensions, researchers have a unique opportunity to address not only change, but also stability.

Limitations

LQR does not go without limitations of course. As already noted in past research (Nevedal et al., 2018), the wide diversity of methods and styles incorporated in LQR makes the conceptualization of this method quite challenging. The limited standardization in the field makes the findings methods-dependent. Hence, it is highly important to explicitly think through and delineate the exact methods used, given the potential impact of the methods on the results obtained. As noted in the present study, simply asking people “what has changed?” creates an atmosphere in which change is expected. Similarly, when questions change over time, responses and contents change as well. These are just two examples which clearly illustrate the importance of carefully choosing and describing the methods used. Other examples are outlined in this text. As is the case with other frail and difficult to reach populations, it is important to remember that follow-up often results in sampling the stronger respondents. This of course impacts the results as well and the interpretation of the results. Ethically, it is important to acknowledge that the study often excludes the most disadvantaged and frail participants, especially when conducted over time. Finally, the flexibility of LQR allows for the assessment of both change and stability. It is important the researchers will come open-minded when conducting LQR explorations and will allow for both change and stability to emerge.

To sum, this paper brings together findings from an LQR study conducted in CCRCs to demonstrate the complexity inherent in LQR. We argue that researchers should be aware of the multiple perspectives, domains or timeframes along which, time, change and stability can be conceptualized. Discrepancies across perspectives, domains, and timeframes are expected and likely enrich our understanding. The richness and diversity of LQR make it particularly useful for the understanding of the complex social phenomenon. Moreover, its flexibility allows to capture both change and stability makes it particularly sensitive to capture longitudinal experiences and perceptions.

Disclosure statement

The authors declare that they have no conflict of interest.

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Appendix 1. Interview Guide

The questions that were present in all first wave interviews are italicized. Additional questions were developed based on early interviews. The interview guide of family members followed a similar style.

Questions for residents- Wave 1 of data collection

Tell me your life story

Tell us about the decision to move?

What were the main reasons for the move?

What made you choose this particular CCRC?

What were your expectations and fears about the move?

Which expectations/fears were fulfilled and which were not? Why?

Tell me about your initial transition? What did you take with you/leave behind?

How are things different from now?

What has helped you adjust? What has made the adjustment more difficult?

What has changed since the transition? In what way is life in the CCRC different from life in the community?

Tell me about your social contacts today? In what way are they different from the period prior to the transition?

How have family relations changed since the transition?

How have family roles changed since the transition?

Tell me about your relationships with staff?

What would you tell a friend who considers moving to the CCRC?

What are the advantages and disadvantages of this place compared with the community?

Questions for residents- Wave 2 & 3 of data collection

How things have been for you since we last met? What has changed/stayed the same?

What is this place for you?

What needs to happen for this place to be called a home/What has made you feel this is your home?

Tell me more about your relationships with friends, family, staff etc.

Tell me more about the nursing unit over here.

What is the role of the physical environment in your adjustment process?

Tell me more about your expectations from old age?

What does successful aging mean to you?

How is your own aging different or similar?

Give a title to your transition
