

2

DESIGNING QDMs

Addressing Challenges and Ethical Dilemmas

(Coauthored With Hannah Musiyarira)

This chapter will provide a practical insight into the process of preparing and conducting a QDM associated challenges, as well as provide guidance on how to address each of these. It will begin by considering appropriate approaches to sampling, recruiting, and subsequently retaining participants in QDM studies before considering different QDM diary designs and how these may best align with different research questions. It will also consider the benefits and challenges of using QDMs as part of a broader multimethod study and will provide practical advice on how to consider the management of data overload at the design stage. Finally, it will examine ethical issues particularly relevant to QDM studies and how to manage these at the design stage and beyond. The application activity at the end of this chapter will include a diary design worksheet that readers can complete to carefully consider the design of their own research projects based on the contents of this chapter. By the end of this chapter, readers will have a good understanding of the different practical considerations to think about when designing their own QDM study, including ethical issues and how to plan for some of the key challenges associated with QDMs.

In this chapter, we will take you step-by-step through the QDM study design process, discussing challenges at each stage and some of the different ways we have addressed these challenges across different diary projects. We are writing this chapter collectively with Hannah Musiyarira, an ESRC-funded PhD student whose research focuses on understanding the experience of people with long-term health conditions in the workplace, particularly how they make regular decisions regarding whether, when, and how to work when experiencing health challenges, as well as the ongoing impact of these decisions on their well-being. By drawing on Leighann and Laura's experiences across projects over time and drawing on QDM research more broadly, as well as Hannah's current experiences as someone who is presently navigating the benefits and challenges of designing and engaging with qualitative diary research, we aim to provide those of you who are new to QDM research with a range of useful suggestions that will

help you on that journey. We will begin at the beginning by first considering sampling strategies and approaches useful for QDM studies.

SAMPLING FOR QDMs

Sampling is undoubtedly one of the most challenging aspects of QDM research. Researchers may therefore quite reasonably approach QDMs with some apprehension, fearing challenges may arise in acquiring and maintaining participants due to the level of commitment required (Bolger et al., 2003). While these concerns are justifiable and should encourage researchers to ensure that diaries are, indeed, the most appropriate method to answer their research questions (see Chapter 1), there are a number of approaches to support you in minimizing these challenges. As with many other methods within social science research, a carefully thought-out plan to locate and recruit participants, informed by a research question(s), is key (see also Hyers, 2018).

The plan to recruit participants should, of course, be informed by the focus of the research, both in terms of the type of participants required and the proposed sample size for the diary element of your study. For example, which groups and individuals should the researcher engage to answer their research question (Alaszewski, 2006)? Often for QDM studies, researchers are aiming to recruit participants who have experience with the phenomenon or behavior they are interested in. Patton (2002) suggests that what we are aiming to explore must also influence our sample size; however, as with all research, issues surrounding what will be deemed credible and what resources are available also play a major part in how many diary participants will be appropriate.

Before moving on to explore the most common sampling methods employed for qualitative diaries, it is perhaps appropriate here to acknowledge that ontological and epistemological orientations will determine both what the researcher is hoping to achieve via their sample and the role of each participant within the diary study. For example, Saunders (2012) emphasizes that certain ontological positions, such as those more aligned with interpretivist positions, would suggest the need for a representative sample to be inappropriate. Researchers with such views would tend to use nonprobability sampling techniques (nonrandom), an approach most common within QDM research. With that being said, it is possible to collect data for qualitative analysis where the participants have been chosen at random (probability sampling); this sampling technique eliminates the researcher's judgment in terms of selecting participants (Kvale & Brinkmann, 2009; Saunders, 2012).

As emphasized, however, in most cases, qualitative research relies on nonprobability sampling techniques to select participants with the research aims in mind throughout. When doing so, Hyers (2018) argues that the role of participants within the diary study must be considered, depending on the researcher's epistemological position. For example, participants may be characterized as informants who provide the researcher with details of their experience. In other cases, where research designs are more participatory, they may be viewed more as coinvestigators who work in collaboration with the researcher (see also Hayes et al., 2024). All of these considerations are included here to emphasize the importance of not only approaching sampling with a clear view of the research aims but also understanding the ontological and epistemological underpinnings of the research to establish requirements from and expectations placed on the participants who will be recruited and the most appropriate way to recruit them.

As one of the biggest challenges in terms of participant recruitment is locating individuals willing to commit to qualitative diaries, it can be useful to begin by using relevant personal contacts and connections wherever possible (Radcliffe, 2013, 2018). It is often noted in existing diary literature that participants are more likely to agree to take part in a study if they have had personal contact with the researcher themselves (Bolger et al., 2003; Radcliffe, 2013). For this reason, convenience sampling can be an appropriate and justifiable approach, whereby the researcher uses their own personal networks and contacts to attain an initial small sample of QDM participants. From this point, snowball sampling can be particularly effective and is, therefore, one of the most common sampling strategies used in QDM research (Radcliffe, 2018).

Snowball sampling involves a participant who has already taken part in the study recruiting members of their network to also take part in the research. This can often occur when a participant has developed an interest in the study and can identify others who may fit the selection criteria (Hyers, 2018). This can be a particularly useful approach as those who have already engaged in the diary, and often found being involved in the research interesting and insightful (Cassell et al., 2020; Radcliffe, 2018), can share their experience of taking part with others in their network, which can garner further interest (Radcliffe, 2018). For instance, in Laura's research with dual-earner couples with children, she began by sharing her recruitment advert on Facebook among existing contacts and connections. From here, a few individuals expressed interest in taking part and discussed this with their partners, which led to the recruitment of two couples initially. Once these couples had taken part, Laura discussed with

them how they had found the process and also whether they would be happy to ask relevant others in their network if they might be interested in taking part, reminding them of the inclusion criteria. Throughout the course of recruitment, some participants offered to share this with others, without Laura even needing to ask, often because they had enjoyed the experience or found it useful, could think of relevant others who might be willing to take part, and due to a desire to further support the research. At this point, following interviews and diary engagement over time, a strong rapport is often built with participants, and they also become interested and somewhat invested in the research, which can result in a desire to support further recruitment efforts.

It is important to note here that both types of sampling discussed above are subject to criticisms (e.g., Bell et al., 2022; Biernacki & Waldorf, 1981), particularly with regard to the associated risk of attaining a largely homogeneous sample. However, while it is important to reflect on potential implications of homogeneity in your sample when writing up your findings and considering limitations, this can be justified in cases where challenges in recruitment would otherwise risk preventing valuable data from being collected. For instance, this approach has previously been suggested to be useful and appropriate when seeking access to hard-to-reach samples (Radcliffe et al., 2022; Saunders, 2012) and also more generally where the data would otherwise be difficult to attain, as is often the case with QDM data (e.g., Radcliffe & Cassell, 2014).

It is also important to carefully consider your research aims when designing your sampling strategy and keep in mind instances when the potential homogeneity of your sample may be particularly problematic. For instance, if a vital element of your research project requires recruiting a diverse group of participants, it will be important to consider a more purposeful element to your sampling approach alongside other sampling strategies mentioned above. Here, Saunders (2012) suggests the use of purposive sampling, whereby the researcher uses their judgment to select participants with diverse characteristics to provide as much variation as possible within a data set. Such a purposeful approach often requires being responsive and strategic throughout the recruitment process—for instance, considering where recruitment adverts are shared, as well as intermittently taking stock of the diversity of your sample so far, and subsequently considering different tactics to ensure the diversity you are seeking. Building elements of purposive sampling into your sampling strategy alongside convenience and snowball sampling can also be useful to address some of these challenges. For instance, in their study exploring the intimate lives of asexual people, Dawson et al. (2016) sought to attain daily diaries completed over a 2-week period from both members of a couple. Aware that initial recruitment strategies focusing upon a particular

relevant network may risk their participants aligning predominantly with the typical demographics of previous studies (primarily well-educated, middle-class, white, American females), they sought to diversify their sample, by also employing a purposive sampling strategy. They purposefully targeted individuals who did not fit this demographic by using a variety of recruitment efforts, including writing an article for popular media about their research and posting notices in public spaces particularly likely to reach other groups, before being selective of the final number of participants included in the study, keeping demographic diversity in mind. Relatedly, during Hannah's recruitment process, her focus on long-term health conditions led her to recognize the need to capture the nuanced experiences of individuals with both physical and mental health challenges. She employed tailored advertisements, adjusting wording slightly for different platforms—using broader language like “long-term health condition” on social media but specific terms like “chronic” on support pages. This approach highlighted the subjectivity of individual identification, particularly with labels like “disability,” ensuring broader outreach and acknowledging diverse perceptions of health conditions (see also Budworth, 2023). Targeted adverts allowed Hannah to be responsive to various sampling needs, for example, to capture both on-site and hybrid/home workers. Therefore, convenience sampling is often used in conjunction with other sampling techniques, which may be iterative in nature and should always strive to align with your research aims.

This combination of approaches (i.e., convenience, snowball, and purposive sampling) can be particularly useful for diary studies whereby cases are difficult to identify. With the increase in the use of social media sites such as Twitter and LinkedIn, researchers can use the convenience element of their personal networks while concurrently taking a more purposeful approach by being explicit about the selection criteria for the study and allowing members of their networks to self-select based on these criteria. In addition to this, snowball sampling, rather than relying solely on participants' recommendations, requires judgment from the researcher to determine whether or not participants are eligible for inclusion and align with the goals of the study (Bell et al., 2022). Importantly, when it comes to recruiting for QDM studies, it is often useful to employ a variety of different sampling strategies to achieve your desired sample and to be sure to build adequate time into overall study design to permit this.

Whichever sampling technique or approach to choosing cases is adopted within a QDM study, the level of commitment required can make it more challenging to achieve an extensive sample. In this case, it can be useful to consider how many participants you actually need to recruit onto the QDM element of your diary study. Depending on your philosophical underpinnings and the

publication standards and expectations associated with your particular field of research, there exists strong justification for smaller samples in QDM studies (e.g., Gregorius, 2016; Sudbury-Riley, 2014; Thompson, 2023; Zundel et al., 2018) based on their longitudinal or at least “shortitudinal” nature and relatedly the extensive data that will be obtained. For instance, Chen et al. (2022) discuss analyzing 205 online written diary (blogs) entries from 12 frontline nurses during the COVID-19 pandemic. Consider, therefore, that depending on your approach, it may be that participants are not the unit of analysis but rather that particular “events” are the focus (e.g., Radcliffe & Cassell, 2014). In this case, even where participant numbers are fewer, the number of events for analysis will likely be substantial.

For those grappling with particular expectations of journals with regards to larger sample sizes, even when it comes to qualitative research grounded in interpretivist traditions, you may consider that QDMs are often used alongside other methods (see “Using QDMs With Other Methods” section), such as interviews, where larger samples could be tackled with interview data, with a smaller subsample asked to keep diaries (e.g., Crozier & Cassell, 2016; Radcliffe et al., 2022; Smith et al., 2013; Spencer et al., 2022). In the case of attaining a broader sample of interview participants (or similar) and a smaller subsample of those engaging with QDMs, this also opens up additional recruitment strategies. For instance, using “interviews as a gateway” can be a particularly useful strategy, wherein participants who engage in an initial interview stage of the study are, where relevant (e.g., if they have ongoing experience of the phenomenon under investigation), subsequently invited to participate in a second QDM stage. By using this strategy, you provide the opportunity for rapport building and the important “personal contact” (Bolger et al., 2003), often deemed necessary for QDM sampling, during the preliminary interview stage of the study. For example, Hannah employed interviews as a gateway to select a proportion of her diary participants, a process contingent upon participants’ demonstrated interest in the research, alignment with sampling criteria, and a nurtured rapport. Emphasizing the voluntary nature of the study was key here to ensure no participants felt obligated to take part. However, a number of interested participants emerged, driven by their personal resonance with the topic and a heartfelt appreciation for the opportunity to openly share their experiences within a supportive space. This was part of a dual-route recruitment process, taking place in addition to a separate call for diary-only participants using adverts shared on social media and support groups.

Drawing on a combination of the above strategies, in line with your own research aims, should help you to attain the sample you need for your QDM

study. Of course, after you have worked hard to obtain your sample, the next important challenge to consider is participant retention over the course of your QDM project. In the next section, we will explore potential reasons for participant dropout in QDM research, challenges around data loss, and, importantly, how these risks can be reduced.

PARTICIPANT RETENTION AND ENGAGEMENT

It is no surprise that retention rates for QDMs are often lower than those for other forms of qualitative data collection since researchers are asking for repeated responses over a period of time, as opposed to a single point in time (e.g., one-off interview or focus group). This evidently places an additional burden on those taking part, which should be acknowledged (Bolger et al., 2003). The groups targeted in your research should also be considered carefully in the design of your diary and in your retention strategies. For instance, are your participants likely to have busy schedules or limited spare time, or will ongoing engagement be particularly emotionally or physically taxing for this group? This can be further addressed in considering the mode of QDM used as we will go on to discuss in subsequent chapters, but it is evidently also important to keep this in mind when considering, and preparing for, retention rates and appropriate supports that can be put in place to make the experience of engaging in your QDM project as easy, flexible, and enjoyable as possible. Therefore, while it is often recommended to aim for a higher number of participants than your planned sample size to account for participants who leave the study (Plowman, 2010), this may be more pertinent in some samples than others. For instance, in Laura's research with employed single parents (and even with busy dual-earner couple parents), the dropout rate, as well as the regularity with which the diary would be maintained, was considered fairly high risk, thereby increasing the importance of reaching out to a larger sample than would actually be required.

Relatedly, it is important to think carefully about the length of time for which you are requesting participants to keep the diary and how frequently you are asking them to record an entry. As with most methodological decisions, this should be based on the research questions you are seeking to answer. Ask yourself, for how long do I need participants to complete the diary to ensure that I will capture sufficient data to answer my research questions? Consider your answer to this question alongside deliberation about the appropriateness of the commitment you are seeking from your participant group. Decisions around the length of the diary study should usually seek to balance these two important

issues. Further, it is also important to consider how frequently you will require participants to make an entry to enable you to answer your research questions. For instance, if you are seeking diary entries more regularly than once a day (e.g., event-contingent designs), the chances are that you might be able to reduce the overall length of the study as there will have been more opportunity to collect sufficient data to answer your research questions, alongside considerations regarding participant fatigue and what it is reasonable to ask your participants to commit to for the purpose of your research. Alternatively, if you need to seek diary completion over a much longer period in order to be able to answer your research questions—for instance, if you are seeking to investigate change over a particular period of transition (such as the transition to parenthood)—it is likely to be less appropriate or feasible to expect participants to keep a daily diary (not to mention that you would likely collect more data than you are actually able to analyze! See Chapter 6). Considerations about diary length and frequency of recording are therefore intertwined with the need to reflect on the two concurrently. Regardless of the duration or frequency of diary completion, Hyers (2018) argues that incentive for a diary study is particularly important, suggesting that some kind of compensation is necessary due to time commitments and, often, having to bring materials or correspondence into their everyday space. Hyers recommends that rewarding participants should not be so great it seems coercive but something to be considered by researchers should they have the means to do so, particularly if recruiting participants from a group who may be unable or unlikely to volunteer otherwise. A pertinent point to note here is that incentivization need not always be monetary and, depending on what is most appropriate for your sample or feasible within your own resources, could also offer a focus on an important social issue, the chance to gain skills, or the therapeutic benefits that come with diary keeping. In Hannah's research, monetary incentivization in the form of a voucher was deemed appropriate and was available via her funding route. It was important to acknowledge that offering financial incentives has the potential to impact the type of participants volunteering for the study and their reasons for doing so. However, Hannah felt it important to acknowledge the commitment of participants, who are likely to be individuals with busy work schedules who face daily challenges navigating their work and personal lives alongside a long-term health condition. As such, diary participants were eligible for a £5 e-voucher for every week they took part, up to 4 weeks, and a maximum of £20. Incentivizing in this way acknowledges that participants' time is valued no matter how many weeks they take part in the study but also may encourage longer participation and recognition of those that have committed to a prolonged period of participation.

However, Bolger et al. (2003) argue that monetary incentives and relying on participants' desire to contribute toward science do far less to retain participants when compared to the importance of maintaining contact with them throughout the process. It is for this reason that the ongoing relationship between participant and researcher is so important throughout a diary study. This relationship will allow a participant to feel comfortable enough to reach out should they have any concerns or queries about the study, rather than halting diary completion, providing minimally completed diary entries, making "best guesses" when they have questions, or dropping out of the study altogether. It is, therefore, important to reach out to participants regularly throughout the QDM element of your study, providing you with the opportunity to check how they are finding engaging with the research and providing them with the opportunity to raise any concerns or ask questions (Radcliffe, 2013).

Remaining in regular contact with those completing the diaries is also essential to try to minimize data loss within the study. Unlike most other qualitative methods, the researcher will not be physically present during the collection of data and, therefore, cannot ensure that relevant information and adequate depth in terms of insights are being captured (Radcliffe, 2013). Let us consider the data collection process engaged in when collecting data via qualitative interviews, for example, where researchers will often work to ensure that they are able to sensitively bring discussions back to the topic on which the research is focused, to enable the collection of data that will help to answer study research questions (see Dempsey et al., 2016). Further, where relatively short answers might initially be provided to questions asked during an interview, here researchers will generally use pre-prepared or "on-the-spot" follow-up questions to attain greater depth of insights, particularly important for qualitative research methods more generally where context, complexity, and nuanced details are tantamount to good research (see Robinson, 2023). During the completion of qualitative diaries, beyond the instructions you have provided participants with initially and, in the case of semi-structured diaries, your careful design of the diary questions posed to participants within their diaries, you will usually no longer have any capacity to influence the diary data they record, at least not in situ or in the moment. Plowman (2010) states that close contact with participants during a diary study is key to enabling them to ask questions of the researcher should they be unsure or to notify them if they have missed any entries. Similarly, it is advised that, wherever possible, QDM studies are designed in a way that enables participants to easily share diary entries with the researcher on a semi-regular basis, to allow researchers to pick up on misunderstandings, challenges, and a lack of depth in responses, earlier in the study to enable further discussions

between researcher and participant along the way (Radcliffe, 2018). Having the opportunity to be kept informed in this way reduces the chance that the researcher has any surprises when it comes to retrieving diary data. Similarly, piloting QDMs can be particularly useful in ensuring the information given before data collection is clear and provides participants with enough guidance to ensure that data relevant to the research question(s) are collected. We often recommend also trying to keep the diary yourself for at least a few days to see how you find the process on the other side of the diary keeping. This can also be a useful addition to your own researcher reflections, and you can also keep notes in your own researcher journal on how you experienced journaling as a participant. This may sound like diary overload (and we do certainly love our diaries!), but this process does offer valuable insights into how participants are likely to experience completing your qualitative diary.

As alluded to above, the diary instructions that you provide for participants taking part in your study are also of particular importance. Beyond the traditional participant information sheet, which will provide them with an overview of your research and broadly what will be involved if they take part, an additional “diary instruction sheet” should also be created. The careful creation of this document is particularly important considering the aforementioned challenges associated with the lack of researcher presence during the completion of qualitative diaries, making it vital that you provide clear instructions that participants can refer back to in your absence. While the content of diary instruction sheets may vary from project to project (and depending on diary medium), they will usually include a brief statement/reminder of the purpose of the research in lay terms, a bullet point list of prompts or things to keep in mind when recording diary entries, a reminder of when participants should record their entries, and a reminder of the confidential nature of anything they write in the diary. Here, just as on the more usual participant information sheet, it is again helpful to include the contact details of the researcher so that they have these easily to hand should any further questions arise. Over the course of Chapters 3, 4, and 5, you will find examples of diary instruction sheets, which we hope will serve as useful guides as you begin developing your own.

In addition to the above key considerations, more broadly allowing flexibility in how participants may complete their diaries can also reduce the likelihood of withdrawal. Baker (2023) describes how allowing creativity in her diary study, such as using pictures or creating mind-maps, helped to maintain participant engagement. After one participant withdrew from the study early on, stating she did not enjoy writing, Baker was able to amend the criteria to reduce the likelihood of further withdrawals. This example highlights the importance

of balancing the needs of the research with what may work best for your participants (see also Budworth, 2023; Hayes et al., 2024). Considering different modes of QDMs is an issue we will turn to over the course of Chapters 3, 4, and 5, where we will consider the importance of aligning the type of diary used not only with your research question but also with your sample. However, we also advocate for flexibility in the modes available to your participants wherever feasible within your QDM study, having personally found similar experiences to that of Baker (2021) noted above. We will discuss this further in Chapter 5, where we discuss the flexibility often inherent in app-based diaries. However, it is important to consider whether some degree of flexibility is possible even where technologically mediated diaries might be unfeasible (for an excellent example, see Budworth, 2023).

In thinking about the ways in which we can attain and retain participant commitment in our QDM studies, we have already gone some way to beginning to think through important QDM study design considerations, including the duration and frequency of the diary study and how we might prepare the diary instruction sheet. We will next move on to consider the more practical elements of the design of the actual diaries themselves.

DESIGNING QDMs

Diary Designs

One of the many benefits of implementing QDM's is the flexibility afforded to researchers when it comes to how these diaries are designed, enabling alignment with your specific research project and philosophical underpinnings. With this flexibility, however, come important decisions to determine which design is most appropriate in best supporting you to achieve your research aims. Following on from discussions of length of the diary study and frequency of required reporting, a key diary design consideration is when you will ask your participants to complete their diary or, in other words, what will be the “trigger” for them to make a diary entry. Eckenrode (1995) describes three general categories of diary designs—namely, interval-contingent, event-contingent, and signal-contingent designs—which can act as a useful starting point.

Interval-Contingent Diary Designs

Interval-contingent designs require participants to record their experiences at regular, predetermined intervals of time, which should be communicated to the participant before data collection. In this sense, the “trigger” for diary

completion would be the passing of a particular period of time and/or the arrival of a particular time of day, week, or month. According to Bolger et al. (2003), this type of diary design is particularly useful when the researcher feels the phenomenon of interest may vary day-to-day but should be recalled well over the day. If we think back to Chapter 1, where we discussed key reasons for using QDMs, this is likely to align well with studies using diaries because they are interested in examining change over time. For instance, in Leighann's research investigating mistreatment in the workplace, she adopted an interval-based design asking participants to report their workplace experiences and anticipation of going to work the following day at the end of each day. Here, Leighann adopted an interval-contingent diary design because she was interested in not only capturing experiences on days where participants actually experienced mistreatment or negative interactions but also understanding how they experience the workplace even on days where such interactions or experiences do not occur. This, therefore, enabled her to capture the "ebbs and flows" of mistreatment experiences over time.

When using an interval-contingent design, you may choose to ask participants to record once a day for a period of 4 weeks or, if the phenomenon of interest should vary throughout the day and this needs to be captured, ask participants to record several times a day but usually over a shorter period of time. Alternatively, you may ask participants to record an entry at the end of each week or at particular times of the month over a longer time period, depending on your research focus/topic. While it can be useful to agree with participants, before commencing with the diary study, a particular time when they might complete the diary in order to support regular completion, it is paramount to consider that some flexibility may be needed to ensure adequate data are collected and to prevent unnecessary stress for participants. For example, while it might be agreed with participants engaged in a daily diary study that they complete their diary on the train home from work, it is beneficial and more realistic to permit participants some flexibility as to when they record, as participants' schedules are often busy and varied. Bolger (2003) also notes the importance of spacing within interval-contingent diaries. Intervals that are too long can increase retrospection, therefore potentially undermining one of the main benefits of QDMs, which is their ability to capture data as close to the experience of interest as possible. For example, reflecting on experiences, thoughts, and emotions that have occurred over the course of the past month may capture a more general overview of the month, may be influenced by how participants are currently feeling at this point in the month, and may be subject to the benefits of

hindsight as discussed in relation to data collection via interview in Chapter 1. Of course, you need to weigh up the risks of introducing further elements of retrospection alongside the time frame that makes most sense for your study, and where longer spacing between diary entries is deemed most suitable, this is something that you can reflect on in the analysis and write-up of your research findings. Arguably, there may be some study phenomena where greater spacing between entries can be justifiable, especially where it is necessary for participants to keep diaries for a longer period of time (e.g., capturing shifting identity experiences across the transition to parenthood) and others where maintaining a shorter time period between entries to minimize retrospection to a greater extent is particularly important (e.g., when capturing particularly transitory thoughts, feelings, and emotions, such as intrusive and negative thoughts, experiences of pain, or feelings of being (de)motivated). As always, when making such decisions, it is important to weigh up the desire for data wherein retrospection is minimized, alongside considering the burden placed on participants, which may be too high where studies require regular recording over short intervals, over a longer time period.

Event-Contingent Diary Designs

An event-contingent design requires participants to record a diary entry whenever a preestablished event takes place. In this case, the “trigger” for diary completion is the occurrence of this particular event. This could be when you think about or discuss a particular topic (e.g., Ferguson & Chandler, 2005; Mooney et al., 2015) or when a specific external event occurs, such as when participants make a particular decision (e.g., Baker, 2021), when a conflict between work and family responsibilities occurs (e.g., Radcliffe & Cassell, 2014, 2015), or when making a transition between two domains or roles (e.g., Chamakiotis et al., 2014). Event-contingent designs are therefore particularly useful when the aims are to record a specific incident or event in as much detail as possible, meaning that an interval-contingent design may risk missing the rich, “in-the-moment” (or as close as reasonably possible to the moment) details of specific, transitory events (Radcliffe, 2013). Here, if we think back to Chapter 1, where we discussed key reasons for using QDMs, this is likely to align well with studies that are employing diaries because they are interested in capturing rich, momentary details of specific events, or routine occurrences, as close to the time at which they occur as possible.

When using an event-based QDM design, clarity of communication regarding the specific event(s) or incidents that you want participants to record

is particularly important as any uncertainty surrounding what they are required to record risks leading to important data being missed. For instance, in Laura's research on decision-making processes involved in resolving everyday work–family conflicts, she was particularly interested in capturing daily events that could be considered so routine and mundane by participants that they may not see them as significant enough to record in their diaries (e.g., struggling to leave the house on time for work in the morning or to leave work on time at the end of the working day or deciding whether to take a phone call from a school/family member while at work). In such instances, alongside providing clear, written diary instructions as discussed above, Laura found it useful to discuss the importance of the routine and mundane with participants in pre-diary interviews (see below section on using QDMs with other methods) and even to help participants consider examples from their own daily lives. Similarly, in Hannah's ongoing research on people with long-term health conditions and how they make decisions regarding whether or not to work when they are feeling unwell, an event-based element of the diaries was essential to capture this decision-making process in, or close to, the moment. In the interview stage of Hannah's research, it became clear that some participants with long-term health conditions faced these decisions on such a regular basis that they often didn't view them as decisions at all. It was therefore essential to provide a clear outline of what she was aiming to capture, thereby what constituted an “event” in her diaries.

Signal-Contingent Diary Designs

This type of diary design involves participants recording a diary entry every time they are contacted by the researcher. In this case, the “trigger” for diary reporting is a signal from the researcher to do so. This evidently requires some kind of signaling device to prompt participants to record at either fixed or random points in time or a combination of both (Bolger et al., 2003). With the advances in technology and the prevalence of personal digital devices capable of receiving such signals, such as the use of smartphones, signal-contingent designs are increasingly an option in QDM research (Smyth & Heron, 2013; see also Chapter 5). Here participants are invited via their smartphone to complete a diary entry reporting their current activity and/or experiences at the time of the alert (e.g., Consolvo et al., 2017; Karnowski, 2013; Kaufmann & Peli, 2020). For example, Kaufmann and Peli (2020) used this approach to ask participants to report, when contacted by the researchers, if they were using any media at that time and encouraged to use any or all multimedia options featured by WhatsApp, including pictures, videos, and screenshots (see also Chapter 5 for a specific discussion of WhatsApp

diaries). They purposefully chose times to contact participants randomly, so that this would be unanticipated by participants and, therefore, they could not prepare or deliberately choose specific activities in advance, thereby seeking to achieve momentary snapshots of participants' media use. In this way, signal-contingent designs may also align well with studies that are employing diaries because they are interested in capturing rich, momentary details of specific events. However, when taking a signal- rather than an event-contingent approach, you must be fairly sure that the activity or event of interest will occur on a regular basis to ensure that you are able to capture adequate instances to enable you to answer your research questions. Yet, a signal-contingent design may also align with studies using diaries because you are interested in examining change over time. Here, capturing reports of feelings or thoughts about a particular topic, for instance, at random times, over a particular duration, may also lend itself to understanding how these feelings or thoughts change over time, in particular locations, or at particular times of day. This approach may, therefore, have the potential to attain a more comprehensive and authentic picture over time while encouraging enhanced momentary reporting. For instance, Rose (2020) provides the example of understanding how students experience a study-abroad program, highlighting how the anxiety experienced by learners at the end of each day might be very different from in-the-moment anxiety experienced at different times of day, such as when they are attending classes or engaging in social activities. Signal-contingent designs may, therefore, be useful in studies where timing is seen to be an important influential factor on the phenomenon being researched.

However, when considering whether to use a signal-contingent design, it is paramount to carefully consider whether there is a clear rationale aligned with your research questions for requiring this type of diary design, alongside the burden this may place on participants. The feasibility of your particular participant sample being able to complete a qualitative diary entry whenever they are alerted by the researcher is an important consideration. For instance, Kaufmann and Peli (2020) noted advising participants not to reply to their text message signals in situations where the use of smartphones was dangerous or prohibited (e.g., while driving). Of course, such considerations should form part of ethical applications for QDM-based research projects. Here it is important to stress transparency at the point of participant recruitment in terms of how often participants will be contacted and the expectation placed on them regarding how soon they will be required to make a diary entry after being signaled by the researcher. If recording at the time of the signal being received is paramount to the study design, it might be best to consider the most feasible

diary modes for participants to report instantaneously (e.g., audio- or photo-based diaries are often considered quicker than written or typed diaries—see Chapters 3 and 4). Rose (2020) suggests that, in such instances, the use of “logs” rather than lengthier journal entries might be most feasible. However, the disadvantage here is, of course, the reduction of rich, detailed information being provided in the moment. It is, therefore, likely to be more feasible, and potentially ethical, for researchers to allow some flexibility in terms of the time frame during which participants can complete their diary entries following receipt of a signal from the researcher.

Alternatively, where feasible for a particular study, participants may be provided with an option regarding a particular window of time when it would work best for them to receive such a signal or reminder from the researcher, such as selecting a particularly convenient day (Kaufmann & Peli, 2020) or time of day (Consolvo et al., 2017). Consolvo et al. (2017) took this approach, letting participants choose what time they would like to receive a reminder that fit with their personal schedule. These researchers caution against assuming that the time that works best for you will work best for others, noting, for example, that some people work night shifts, go to bed much earlier or later on a regular basis, or have other obligations or routines that are likely to vary across participants.

While we have covered each of the predominant diary-design “types” in turn, it is important to point out that we now often suggest that researchers consider the potential affordances of using a mixed design by drawing on a combination of the above designs. For instance, in Hannah’s research, an event-contingent design is necessary to capture the decision-making process discussed above. However, another important research aim within Hannah’s project is to understand the impact of (not) enacting presenteeism over time and the impact such decisions have on the well-being of these individuals on subsequent days, which lends itself to an interval-contingent design. Therefore, Hannah decided to draw upon a mixed event- and interval-contingent diary design where she asked participants to record a diary entry every time they made a decision surrounding whether or not to work while feeling unwell (i.e., event-contingent), as well as to record an entry every other day, to capture day-to-day feelings in relation to well-being, experiences at work, or experiences taking time off work (i.e., interval-contingent). This mixed design was decided upon to enable Hannah to capture decision-making processes in the moment, as well as the impact of these decisions on well-being and workplace experiences over time. It is, therefore, once again paramount that you carefully consider all elements of your research aims and questions when making decisions regarding diary design.

QDM Structure

Another important element of diary design, beyond considering which type(s) of diary design are most suitable to enable you to answer your research questions, is the amount of structure to incorporate into the diaries. In a similar way to how we consider different types of qualitative interviews, Radcliffe (2013) distinguishes between “semi-structured” diaries, wherein participants are asked to answer a small number of open-ended questions when recording each diary entry, and “unstructured” diaries, where participants are provided with diary instructions, as discussed previously, but without specific questions to answer each time they complete an entry. There are clear benefits and drawbacks to each approach, which center on the desire to avoid leading participants while also ensuring that sufficient relevant information is captured to enable you to answer your research questions. On one hand, adding greater structure to each diary entry might risk hampering one of the main advantages of qualitative diary data collection, which is the ability to capture rich and detailed participant-led data that minimize the extent to which participants’ descriptions are led by the researcher. However, on the other hand, using an entirely unstructured approach can lead to predominantly irrelevant information being recorded, as well as being potentially intimidating for participants who might be faced with a blank page (or the equivalent of, depending on diary medium) on which to express their thoughts, feelings, or experiences (Radcliffe, 2013, 2018). Alongside consideration of your sample and what might be most appropriate for them, as well as alignment with your intended overarching research approach and where you sit on the inductive–deductive continuum, we also highly recommend conducting a pilot study to determine how much structure may be appropriate for your study, trialing different layouts and the richness and relevance of the data each produces. In some cases, it can be useful to consider a compromise between the two, with two to four semi-structured diary questions for participants to focus on when recording each entry, as well as the inclusion of a more “unstructured” element via a question that asks them to record anything else that they deem to be relevant (e.g., see Spencer et al., 2022).

Using QDMs Alongside Other Methods

It is common for QDMs to be employed alongside other forms of data collection, from multimethod approaches using QDMs in conjunction with

another qualitative method, for instance, focus groups (e.g., Koopman-Boyden & Richardson, 2012; Mooney et al., 2015; Moran-Ellis & Venn, 2007), to studies employing QDMs as one component of a suite of methods used within case study designs or ethnographies (e.g., Balogun, 2004; Plowman, 2010; Vincett, 2018). However, by far the most popular complementary method used alongside QDMs is qualitative interviews and, in particular, employing the diary-interview method first proposed by Zimmerman and Wieder (1977).

As discussed in Chapter 1, the diary-interview method was devised as an alternative to the intensive observation in situ required in ethnographies, which Zimmerman and Wieder (1977), as ethnographers themselves, highlighted as particularly time and labor intensive and also not always practically feasible. They, therefore, proposed the use of qualitative diaries, in conjunction with interviews, as an alternative method to participant observation, wherein the diary was viewed as not only a source of data in its own right but also a “question-generating” and, hence, further “data generating device” (p. 489). Here they viewed the in-depth interviews, situated alongside qualitative diaries, as enabling enhanced understanding by allowing further details of experiences reported in diaries to be supplemented by interview data, as well as providing the opportunity to move beyond the particular events recorded with diary entries to examine how these relate to the broader context, attitude, beliefs, and understandings of the participant.

Since then, interviews have been used as an important accompaniment to QDMs across the social sciences and in a variety of different ways to add value, richness, and context to data collection (e.g., Alaszewski, 2006; Bartlett, 2012; Radcliffe, 2013). While a variety of different approaches exist, building on Zimmerman and Wieder’s (1977) diary-interview approach, the most common technique involves both a pre-diary interview and a post-diary interview, as well as the diary keeping itself (Alaszewski, 2006; Radcliffe, 2013). However, as we will discuss, while pre- and post-diary interviews each have their unique benefits, it is also worth carefully considering how they may or may not be most appropriate for your particular project.

The Pre-Diary Interview

A number of important benefits of conducting interviews before employing QDMs have been highlighted, particularly in relation to the opportunity it provides for establishing context, rapport building, and the opportunity to explain, discuss, and answer questions surrounding diary completion in person

(Radcliffe, 2013, 2018). Initial interviews allow insight into the broader world of participants and the broader context in which their daily experiences will be situated. Further, recalling earlier discussions regarding the importance of personal connections and rapport (Bolger et al., 2003) when it comes to attaining and maintaining participants willing and committed to qualitative diary completion, an initial interview provides an excellent opportunity to establish such connections, build rapport, and establish trust.

Another important benefit of the pre-diary interview is that they are a key way to ensure that participants understand what is expected from the qualitative diary element of a research study, during which time the researcher will not be present. These interviews are therefore an excellent opportunity to discuss the pragmatics of diary completion wherein the participant can be verbally provided with as much information as possible regarding the aims of the diary while allowing them the opportunity to ask questions and raise any concerns (Radcliffe, 2013). For example, as previously discussed, in Laura's research on decision-making during daily incidents of work–family conflicts, the importance of recording minor, routine work–family conflicts is emphasized, and she often uses initial interviews to do this, including the discussion of specific examples. As part of this initial interview, she also regularly employs the critical incident technique (CIT) (Chell, 2004; Flanagan, 1954; see also Radcliffe, 2013; Radcliffe & Cassell, 2014, 2015), which involves asking interviewees to recall the last time they experienced the particular event or incident of interest. Therefore, Laura often uses the CIT to explore recent daily work–family conflict incidents experienced by participants and subsequent resolution processes. Using the CIT in this way can be particularly useful within pre-diary interviews, especially those that rely on an event-contingent diary design, as this affords the opportunity to talk through a particular relevant event with participants in detail before diary completion, encouraging them to express the level of detail that you are looking for them to record within their future diary entries and making them aware of the kinds of follow-up questions you might ask, or be interested in, should you be present. This enables clear links between discussions in the pre-diary interview and participants' subsequent recording of such incidents within their diaries, therefore enabling participants to understand not only the kinds of incidents, events, or experiences that it would be important for them to record but also the importance of including relevant rich associated details. However, arguably, in this way, pre-diary interviews can risk being potentially leading in terms of the diary content that they may go on to record, providing more influence of the researcher over the data collection

and process, rather than being as heavily participant-led as may otherwise be the case. In addition, where participants have not physically met the researcher before data collection, this may lead to greater feelings of anonymity, as well as further minimizing the influence of the researcher, who at the point of diary completion would remain relatively unknown in terms of identity. Baker (2021), for instance, opted not to collect diaries before the interview stage, which they suggest encouraged participants to respond to diaries more openly. There is, therefore, always a fine balance to strike between the desire to collect data to enable you to answer your research questions and the desire for data collection to be more open and driven by the research process. This means that you must weigh up the benefits of rapport and verbal clarification of the purpose of the QDMs against the desire to have as little influence over the data collection process as possible, keeping both the aims of the research and participant well-being in mind throughout.

Further, interesting data can be attained via the comparison of the narratives people construct in initial interviews and the experiences reported in diaries, which, as discussed in Chapter 1, each provide very different kinds of data. While interviews tend to provide insights into how people reconstruct and internalize their interpretations of reality to produce more cohesive narratives around a particular topic, QDM data provide more “in-the-moment” data that lend themselves to the production of messy, shifting, and often contradictory experiences. Therefore, being able to compare data generated via interviews and QDMs can lead to a more complex understanding of issues under investigation. For instance, in Laura’s research with single mothers where she was interested in how they deal with intense competing work and family norms and expectations, she found that during interviews, they often presented a more cohesive narrative of who they were as employed single mothers, but in diary entries, ongoing identity conflict was observed in action, providing insights into the processes involved in how such complexity is navigated to reach and sustain a more cohesive narrative and sense of self and the role of external constraints (see Radcliffe et al., 2022).

One final point to note with regard to pre-diary interviews requires us to recall the sampling strategy options considered earlier in this chapter. In this sense, such interviews, when used initially as a broader sample in which not all interview participants may become diary participants, can also act as a gateway to help identify future relevant potential diary participants, noting that this not only allows insight into participants who might make particularly good diary participants for your study (e.g., they have a current or ongoing

experience of the phenomena focused upon in your research) but also that recruiting participants for an interview may often prove easier than recruiting them directly for a QDM study. In this sense, once rapport has been built, it may be easier to subsequently approach relevant participants to enquire whether they might be willing to commit to a second phase of the study. While in some cases, where strong rapport has been established, it might be appropriate to discuss the potential for their participation in the qualitative diary element of your study directly within the interview, in other cases, it can be pertinent to allow some time to pass before issuing such an invitation. For example, in Leighann's research examining mistreatment in the workplace, interviews were often highly emotional and taxing for participants. As such, after several declined invitations to keep a diary, she soon realized that it was not appropriate and/or conducive to ongoing participation to invite participants to keep a diary during/at the end of the interview. Instead, she found that if she waited a week or two, interview participants were more likely to agree to keeping a diary and thereby ongoing participation in the study. This highlights the importance of considering the most appropriate timing regarding requests for participation in qualitative diary elements of your study, following preliminary interviews, particularly when studying topics deemed highly sensitive or even following an interview that might have unexpectedly aroused negative recollections and associated emotions.

Post-Diary Interviews

Interviews following diary data collection and preliminary analysis can also bring a number of important benefits, the most pertinent of which is the opportunity it provides to seek further detail and clarification from participants on the content of the diary entries. As this is arguably the key benefit of post-diary interviews, it is usually recommended that at least an initial familiarization, and ideally a first-pass analysis of diary data, is engaged in before conducting follow-up interviews. Following Zimmerman and Wieder's (1977) advice in the development of their diary-interview approach, it can be useful to develop post-diary interview questions that are specifically based on the contents of the qualitative diary entries, where appropriate. In this sense, diary entries can be considered a "conversational technology" (Gammack & Stephens, 1994, p. 76), or elicitation device, when used in conjunction with post-diary interviews, wherein specific experiences reported within diary entries become the focal point of conversations during the interview. Harvey (2011) describes the use of private diaries in a study exploring participants' intimate everyday

experiences wherein the private diaries themselves were not actually shared with the researcher but rather used as a prompt for deeper discussions during follow-up interviews. In this sense, post-diary interviews provide space for participants to reflect more deeply on their entries, providing additional details, as well as their own post-experience analysis, thereby allowing the researcher the opportunity to not only clarify any areas of uncertainty with the participant but also attain additional data based on participants' own analysis and reflections (Radcliffe, 2013; Thille et al., 2022).

However, it is important to note some ethical concerns to take into consideration when asking participants to go over experiences or events reported in qualitative diaries. In some instances, where information is not particularly sensitive, it can certainly be useful to discuss particular reported experiences in greater detail, but in other instances, for instance, where the topic or even just the specific experience reported involves potentially sensitive or upsetting details, this will need to be considered and approached with great care. For example, in Leighann's research on mistreatment at work, she decided not to engage in post-diary interviews since she deemed the topics discussed likely to be highly sensitive. Therefore, going over these experiences with participants and probing for further details may lead to negative implications for participant well-being. Thereby, the desire for further data must be weighed against the real potential of having a negative impact on participants. In Laura's research investigating couples' experiences of navigating conflicting work and family responsibilities and demands, wherein she found conducting follow-up interviews highly useful in gaining further insights into participants' daily decision-making, it remained important to take great care not to ask follow-up questions about any events recorded that may be considered potentially sensitive, such as those that were clearly emotive for the participants, even where further insights may have been useful. Further, given that both members of a couple often completed private qualitative diaries in Laura's studies, ensuring that no questions were asked that may risk indicating any events reported in their partner's diary was also of paramount importance. For instance, where discrepancies or contradictions existed across partner diary entries, while it may arguably have been interesting to explore such discrepancies further, Laura took care not to discuss any such issues within individual follow-up interviews (see also Radcliffe, 2013). Of course, here it is also important to point out that where group or couple interviews may be useful in some studies and could potentially be considered when designing pre-diary interviews (e.g., Radcliffe & Cassell, 2014), this would certainly not be appropriate

when conducting post-diary interviews wherein individuals have kept private, personal diaries, and therefore, individual post-diary interviews are strongly advised. Broadly, in line with much ethical guidance, it is always important to balance the desire or need for data against the potential impact on participants, and we would argue that this is especially pertinent to consider when deciding whether and how to use post-diary follow-up interviews. Ultimately, the interests of participants must come before the desire to collect additional data (Gatrell, 2009).

Thille and colleagues (2022) also discuss the importance of choosing the interval between data collection and the time of the interview. Although to some extent, this choice can be driven by the practical needs of the researcher, there should be consideration of the fact that the length of delay ultimately impacts the proximity of the diary data collection to the present. The authors suggest that the value placed on how close the interview is to when the diary was completed should ultimately, once again, be guided by the research questions. Finally, given the time invested by participants in engaging with QDM studies, as well as the participant reflexivity that we are aware this instigates (Cassell et al., 2020), post-diary interviews also arguably provide a potentially much-needed confidential and nonjudgmental space for participants to share their experiences of keeping the diaries, as well as their own reflections and anything that has arisen for them as a result. We discuss participant reflexivity below in more detail within a broader discussion of ethical considerations particularly relevant to QDM studies. However, in relation to considering whether or not to include post-diary interviews as part of your research design, you may want to consider not only the additional data and insights that attaining how participants went about and experienced maintaining their qualitative diaries affords but also the important debriefing space that this provides for participants. Here, we would suggest that, even in instances where follow-up interviews are not deemed appropriate, it is worth offering participants a space, or informal conversation, in which they can debrief, discuss their own reflections, and gain a sense of closure in relation to the research process in which they have been heavily involved over a period of time. Considering all that we have discussed above, when it comes to deciding on the extent to which you embed qualitative diaries within the diary-interview method, we have provided an “at-a-glance” overview of the pros and cons of using QDMs alone, as well as alongside either or both pre- and post-diary interviews (see Table 2.1). We hope that this will help you think through your own QDM study design, as well as support you in developing a sound rationale for whatever approach you choose when writing up your methodology.

TABLE 2.1 ■ Pros and Cons of Different Diary-Interview Study Design Combinations

	Diaries Only	Pre-Diary Interviews Only	Post-Diary Interviews Only
Pros	<ul style="list-style-type: none">• Participants may be more open as they have a greater sense of anonymity• Less effort to integrate/combine different data types• Spontaneous event recording (e.g., not influenced by content of the interview)	<ul style="list-style-type: none">• Participants may not want to reflect on their diary content in a follow-up interview (e.g., emotive and sensitive content)• Able to explain how to complete diary• Able to establish rapport and trust• Develop interpretive context through interview data	<ul style="list-style-type: none">• Able to probe diary contents/events• Sets a clear “deadline” for both researcher and participant• Bookends research (e.g., helps to give boundaries to the research relationship)• Able to gather feedback on the diary-keeping process (e.g., for improving materials, future research, and methodological articles)
Cons	<ul style="list-style-type: none">• Diary completion may be poor due to lack of engagement and explanation of how to complete entries• Lack of interpretive context (e.g., background information gathered in an interview)	<ul style="list-style-type: none">• Unable to probe diary content, so limited to what is written in the diary (although this can also be a benefit)• Participant may lack closure (NB to have an informal conversation with participants in lieu of an interview)	<ul style="list-style-type: none">• Participants may be reluctant to reflect on some of the content included in their entries (e.g., enhanced scope for sensitive and emotionally charged interviews)• Enhanced workload for researcher to ensure diary data are analyzed before follow-up interview

ETHICAL CONSIDERATIONS

While it is beyond the scope of this book to consider all the various important ethical considerations that should be thoughtfully engaged with when designing and conducting qualitative research projects, as intimated above, there

are a number of QDM-specific considerations. For instance, we have already discussed the importance of carefully considering the amount of data collected, balancing the desire or need for data against the potential impact on participants, the implications of going over sensitive topics again in post-diary follow-up interviews, and the importance of building in flexibility regarding when and where participants are asked to record diary entries. We cover some of these in more detail below while addressing others throughout the remainder of the book, which we encourage you to use alongside broader ethical guidelines within your own institutions and discipline-related ethical codes of conduct, as well as engaging with relevant textbooks on ethics in qualitative research (e.g., Iphofen & Tolich, 2018; Miller et al., 2012).

Participant Reflexivity

As noted above and in Chapter 1, one of the additional benefits of QDMs is their capacity to encourage participant reflexivity surrounding the topic(s) of interest (Cassell et al., 2020; Plowman, 2010; Radcliffe, 2018). As we know from broader reflexivity literature, this is generally considered to be predominantly positive as reflexivity is known to be integral to learning and development (e.g., Hibbert & Cunliffe, 2015; Moon, 2013; Suedfeld & Pennebaker, 1997), and providing participants with the space to develop such reflexivity around a particular topic may also support them in feeling less alone with their experiences, with a more nuanced self-understanding, as well as enabling them to feel by a person who genuinely wants to understand their stories (Miller & Boulton, 2007). This can be particularly the case where participants feel that they have not been permitted the space to think about or openly engage in discussion about these topics previously (for a review of the benefits of participant reflexivity, see Cassell et al., 2020).

However, while acknowledging that the opportunity afforded by QDMs in instigating participant reflexivity can be beneficial, researchers must also be aware of related ethical issues. In facilitating the critique of important aspects of their lives, via a research process that instigates participant reflexivity, this may in turn lead to some emotional discomfort for participants (Cassell et al., 2020). The emotive nature of reflexivity and the potential for this to cause some distress for participants, particularly if the topic of the research is sensitive, is well known in existing literature, highlighting how reflexivity is entangled with emotions (Burkitt, 2012; Cunliffe, 2002; Hibbert et al., 2019). For instance, in Laura's research employing photo diaries alongside post-diary interviews, as well as reporting positive experiences of engaging with the study, some participants expressed

more challenging emotions and some discomfort, explaining that “some of them provoked emotion” or that they made “me feel a bit apprehensive about the future” or involved questioning, “Do I really want to be reminded of where my failures are so explicitly? It makes me feel quite inadequate.” In light of this, we would argue that the researcher within QDM studies has some level of responsibility in terms of supporting participants to explore and develop their reflexivity and emotions in a safe space (Cassell et al., 2020; Hibbert & Cunliffe, 2015).

Hibbert and Cunliffe (2015) suggest that the learning process that accompanies reflexivity needs to move beyond the level of disturbance and doubt to create new forms of understanding. Therefore, ensuring that our participants have the opportunity to develop their reflexivity, which may have been instigated by involvement in our research, within a safe and confidential environment, is important (see discussion above on post-diary interviews). Additionally, prioritizing privacy and participant confidentiality when considering the design and implementation of QDM studies, alongside balancing the needs of the research with the well-being of all involved, is essential. Relatedly, it is important to ensure that you are fully aware of, and have carefully considered and prepared for, the potential challenges surrounding participant reflexivity and prepared to sensitively navigate the emotions and discomfort this may bring, demonstrating empathic behaviors during the interview, for example, through sensitive follow-up questioning, and being prepared with avenues for further support if required. Day and Thatcher (2009) discuss how engaging with sensitive diary responses, which often comprise highly emotive writing, can be complicated for researchers; therefore, preparation, discussions within your research or supervisory team, and having the appropriate support in place for yourself in advance, should you need it, are also advisable. Finally, we would recommend ensuring that participants are also aware of the reflexivity that engaging in a QDM study is likely to instigate. While we would reiterate that this is frequently a positive experience enjoyed by participants, by being upfront about this in participant information sheets (i.e., stating that taking part in qualitative diaries is known to encourage reflexivity, which can lead to interesting but also potentially emotive insights), participants are also more fully aware of what the research process entails.

Privacy and Confidentiality

Diaries, by their very nature, are personal, and although the level of detail and sensitivity of the data collected will vary depending on research aims and topics, having access to this data comes with a considerable amount of responsibility. Even where the topic discussed may not necessarily be deemed highly sensitive, as

discussed above, the process of recording a diary regularly and reflecting on personal experiences of any nature has the potential to raise unexpected emotions. It is, therefore, paramount that participants feel safe when agreeing to take part in a diary study and that care is taken to support privacy and confidentiality (Plowman, 2010). Formally, this would be achieved through well-designed and thorough data management and security procedures, which would be outlined in participant information sheets and consent forms, emphasizing the importance of anonymity and confidentiality, thereby helping to create a safe space for participants.

However, when participants are keeping private diaries over a period of time, support should also be provided in terms of helping them to carefully consider their own management of their personal data during this time (i.e., while the data are still with them). Here, considering their own local context, as well as the diary medium, and, where relevant, where or how they will safely store their diary during the period of completion, is also important. This can be especially pertinent when using traditional pen-and-paper or physical diaries, as we will discuss in more detail in Chapter 3. For instance, in research such as that conducted by Laura, in which families living within the same household are completing private diaries, it becomes evident how supporting participants to think about where they will store their data to ensure confidentiality is good practice, to ensure they remain private within the context of their own home and family. Further, considering diaries that may be completed within public spaces, such as in the workplace, may require similar careful data storage plans, as well as support from yourself as the researcher to ensure that diary mediums used are as unobtrusive in this environment as possible. For instance, if diaries might be completed during the working day, how might the diary be designed to ensure it remains as discrete as possible? Consider, for instance, an inconspicuous work-style notebook if a physical pen-and-paper diary is required. With the advent of app diaries and the increased functionality of password-protected smartphones, ensuring the confidentiality of participant data during diary completion may arguably be becoming less challenging (see Chapter 5 for further discussion of app diaries and privacy), yet this should still be considered carefully, for instance, in the context of their own households where passwords and personal mobile devices may be more readily shared.

Balancing Data Needs and Participant/Researcher Well-Being

As intimated above, qualitative diaries are fairly unique in the fact that they often require participants to engage in data collection within their own personal space over an extended period of time (Plowman, 2010). This extended engagement with the research process not only requires additional time and commitment

from participants but also has time implications for researchers, who must maintain contact throughout this period and who will also have a great deal of data to manage and analyze subsequently (see Chapter 6). This additional time commitment requires you to think carefully about how you can best balance the needs of the research and your desire for interesting qualitative diary data, with both your own well-being and that of the participants. For instance, in the example provided earlier in this chapter, Laura elected not to further discuss or examine particularly sensitive issues raised in diaries or discrepancies and contradictions across partner diary entries, within follow-up interviews, to protect individual privacy and well-being (see also Radcliffe, 2013). As we have discussed, it is important to carefully consider whether QDMs are necessary to answer your research questions, whether pre- and/or post-diary interviews are each important, useful, or challenging in your particular study context (see Table 2.1), and to consider how long you will require participants to complete their diaries. Seeking diary completion for longer than is completely necessary has ethical implications for both participant and researcher well-being. For example, in a study exploring daily stressors of university students, diary entries could be collected over a 16-week-long semester to capture experiences throughout the duration of the semester. However, when considering participant burden, the extent of data that would need to be effectively analyzed should participants continue to engage over this time period, and what is actually required to attain important insights into “daily” university stressors, a 2- to 4-week duration seems adequate and, therefore, more ethical. Plowman (2010) also notes the importance of being clear with participants from the outset about what it is that you, as the researcher, are looking for in diary entries, using carefully designed diary information sheets (see examples provided in Chapters 3 and 4) and, where appropriate, pre-interview briefings. This, again, helps to reduce participant and researcher burden by reducing the amount of data recorded that may not be relevant to your study.

Ending the Researcher–Researched Relationship

As is the case within any qualitative research, debriefing participants at the end of engagement is important and, given the ongoing and more intensive investment of participants in QDM research, especially important. Due to the issues emphasized throughout this chapter, particularly in considering participant reflexivity, it is essential to be prepared to provide participants with details of where to access support if needed and, where engaging in post-diary interviews is not deemed appropriate, to offer participants an alternative

opportunity to discuss how they have experienced taking part in the research, to gain feedback on the diary process as a whole, and to enable a sense of closure (Cassell et al., 2020; Radcliffe, 2013). It is also usual that a particularly strong rapport and even a sense of friendship has been established over this time between researcher and participant as a result of continuous engagement over time, which can make it especially important to establish a clear end point to data collection, something that may be usefully achieved by a final interview or debriefing session, as appropriate. This may be particularly the case in research exploring sensitive topics and experiences, such as in Leighann's research focused on workplace mistreatment, where it was not uncommon for participants to reengage contact and provide updates on their circumstances. You may also consider ways in which you can use your research to give something back to your participants, such as feeding back an overview of your findings and/or developing, potentially collaboratively, tools or resources that can support the communities involved in your research. For more detailed discussion/reflections on ending the researcher–researched relationship, please see Batty (2020) and Morrison et al. (2012).

We frequently hear that engaging in QDM research has been a positive experience for our participants, and we hope that by highlighting some of the ways in which we can best support both ourselves and our participants throughout the diary process, you will also find your study participants report similarly positive experiences and that it is an enjoyable and rewarding experience for participants and researchers alike.

APPLICATION ACTIVITY

ADDRESSING CHALLENGES AND ETHICAL DILEMMAS

Reflecting on QDM design considerations discussed throughout this chapter, use this worksheet to consider the design choices you will need to make in your own QDM project. These questions are intended to help you to effectively prepare your QDM study but also to help you structure and think about your rationale and justifications for your design choices when submitting to ethical review boards, discussing your project with supervisors/coauthors, and also writing up your QDM methodology. In completing this worksheet, we encourage you think about the potential limitations of each design choice but importantly how these align with your research question(s) and how your personal philosophical choices inform these decisions. (For a deeper treatment of issues of reflexivity in research design, see Cassell et al., 2020.)

Worksheet 1

1. Sampling considerations

- Who are your target participants and what is your target sample size?
- How and why will this sample enable you to address your research question(s)?
- How do your philosophical commitments/underpinnings inform your sample selection (e.g., to what extent are your participants “informants” or “coproducers” of knowledge)?
- Which sampling strategies are most appropriate and feasible for your research project and why (e.g., purposive, convenience sampling, a combination, etc.; include a consideration of contingency plans)?
- How will you recruit your participants (e.g., how, where, when, and why)?
- What information should you include in your advertisement/recruitment materials?
- Outline a plan for how you will maintain participant engagement and participation (e.g., contact maintenance, incentive measures, participant dropout).

2. Designing your diary: Aligning with your research questions

- Will your diary be interval, event, or signal contingent or a hybrid approach? And why?
- How frequently will participants be required to complete the diary? And why?
- Will your diary be semi-structured or unstructured? And why?
- Will you be combining QDMs with other methods? And why (e.g., the diary interview method; how will the different methods be combined/integrated? will data collection be sequential or concurrent)?

3. Ethical considerations

- How do you plan to navigate participant reflexivity (e.g., participant information sheet, debrief sheet, post-diary interview, or debrief meeting)?
- How will participant privacy and confidentiality be maintained (e.g., consider the risks of participants diaries being read by third parties and/or lost)?
- Does the design of your diary have any potential inadvertent negative impacts on participants (e.g., consider issues of sustained participation; continued reflection on subject matter, unreasonable time commitments)? How can you minimize these potentially negative impacts?
- How will you provide closure to the researcher–researched relationship (e.g., is a follow-up interview/debrief meeting appropriate; are there any risks of doing so)?

FURTHER READING

Batty, E. (2020). Sorry to say goodbye: The dilemmas of letting go in longitudinal research. *Qualitative Research*, 20(6), 784–799.

Bolger, N., Davis, A., & Rafaeli, E. (2003). Diary methods: Capturing life as it is lived. *Annual Review of Psychology*, 54(1), 579–616.

Radcliffe, L. (2018). Capturing the complexity of daily workplace experiences using qualitative diaries. In C. Cassell, A. L. Cunliffe, & G. Grandy (Eds.), *The SAGE handbook of qualitative business and management research methods* (pp. 188–204). Sage.

Rose, H. (2020). Diaries and journals: Collecting insider perspectives in second language research. In J. McKinley & H. Rose (Eds.), *Routledge handbook of research methods in applied linguistics* (pp. 348–356). Routledge.

Saunders, M. N. K. (2012). Choosing research participants. In C. Cassell & G. Symon (Eds.), *The practice of qualitative organizational research: Core methods and current challenges* (pp. 37–55). Sage.

Do not copy, post, or distribute