Balancing Consistency and Flexibility: Challenges and Opportunities in Conducting a Cross-Country Longitudinal Study with Youth Participants in Work-Integration Social Enterprises

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ABSTRACT

Longitudinal studies conducted within the social economy have the potential to provide useful insights by tracing participant experiences and illuminating long-term outcomes of program interventions. However, longitudinal studies are challenging, not only due to retention of participants, but also when a longitudinal study covers a broad geographic area. The authors collaborated in a five-year pan-Canadian longitudinal study following youth participants in work-integration social enterprise (WISE) training programs. This article traces the experiences of study teams in Ontario and Greater Vancouver, providing accounts of the approaches and challenges encountered when working in geographically and socio-economically diverse locales over time with youth participants facing social marginalization. This article highlights three aspects of data collection—recruitment, retention, and research methods and logistics—offering insights into how each team devised its own strategies to fit with local circumstances while maintaining consistency across research sites.

RÉSUMÉ

Des études longitudinales ayant l'économie sociale comme cadre peuvent fournir des données utiles en répertoriant les expériences de participants à divers programmes et en illuminant les effets à long terme d'interventions dans ces programmes. Cependant, les études longitudinales ne sont pas faciles à effectuer, non seulement en ce qui a trait à la rétention de participants, mais aussi en ce qui a trait aux vastes étendues géographiques qu'elles peuvent couvrir. Les auteurs ont soulevé ce défi en collaborant à une étude longitudinale pancanadienne de cinq ans qui a consisté à suivre des jeunes participant à des programmes de formation offerts par des entreprises sociales d'insertion par le travail (ESIT). Cet article examine les expériences d'équipes de recherche en Ontario et dans le Grand Vancouver, fournissant un compte rendu des approches et défis relatifs à leur travail dans la durée auprès de jeunes participants confrontés à la marginalisation sociale

dans des contextes d'une grande diversité géographique et socioéconomique. En guise de conclusion, cet article souligne trois aspects de la collecte de données—à savoir les méthodes et la logistique pertinentes pour le recrutement, la rétention et la recherche—et offre un aperçu de la manière dont chaque équipe a développé ses propres stratégies adaptées aux circonstances locales en s'efforçant de maintenir une certaine cohérence d'un site de recherche à l'autre.

INTRODUCTION

In spring 2017, research teams from Vancouver, Winnipeg, Toronto, Montréal, and Halifax launched a five-year longitudinal, pan-Canadian study of youth who received employment and skills training from work-integration social enterprises (WISEs). The objective of this collaborative undertaking was to use longitudinal data—both quantitative and qualitative—to investigate any long-term difference WISEs make to the youths' labour market participation as well as their personal, social, and economic wellbeing. This complex project was designed as a follow-up to an earlier research project. This previous set of case studies on WISEs (most of which operated in the Toronto area) found that while participants saw marked improvement in their social capital, emotional wellbeing, and human capital through their involvement in social enterprises, generally participants found much smaller gains in their financial situation (Quarter, Ryan, & Chan, 2015). However, many of the WISEs in this study worked with disabled persons on long-term government support for living expenses, drug coverage, and other benefits, which limited their earning potentials. To see if the benefits for participants at WISE training programs could be generalized more broadly and to focus on participants who are likely to have intention to transition to full time employment (directly or via further schooling), the current longitudinal study was designed with an expanded geographic scope covering different provinces and a specific focus on youth.

Longitudinal studies are methodologically difficult to conduct. They are often time consuming, unable to accommodate changing social, political, or economic context, and can fail to produce a robust data set due to high participant attrition. In addition to those complications, this study had challenges associated with the precarious existence of WISEs due to funding insecurity and the social and economic barriers faced by the target youth participants (Calabrese Barton & Tan, 2018; Decker, Dail Marshall, Emerson, Kalamar, Covarrubias, Astone, Wang, Gao, Mashimbye, Delany-Moretlwe, Acharya, Olumide, Ojengbede, Blum, & Sonenstein, 2014; Irizarry & Brown, 2014). Another methodological challenge in this study was the broad geographic scope. The multiple locations for this study across Canada meant that accommodations were needed for regional variations in labour markets, provincial funding of employment development programs, as well as local differences in social and cultural norms and practices within the social economy.

As far as methodology was concerned, the balance between consistency and flexibility was a concern from the onset of the project: the consistency needed in data collection across locations and

over time to ensure the researchers' ability to aggregate the data for analysis in order to present a national picture of the participants' experiences and the flexibility to respond to local circumstances knowing that there would not be a one-size-fits-all methodological approach. Therefore, the regional research teams continuously shared and learned from experiences in each other's data collection efforts resulting in ongoing adjustments of research methods, strategies, and tools. As the study rolled out, the research teams from across the country had to deal with numerous data collection challenges almost right from the start, including recruiting eligible participants, figuring how to compensate the participants, and ensuring accurate contact information for future follow-ups and participant retention. While some of the challenges stemmed from the longstanding difficulties facing youth and WISEs, there were also logistical headaches that nonetheless demanded considerable attention from researchers. In addition, the unanticipated and lasting challenge of the COVID-19 global pandemic started bringing about significant public health, social, and economic disruptions in Canada about halfway through the longitudinal study in March 2020. As a result, further modifications had to be implemented to continue with the final follow-up years of data collection.

This article is focused on the data collection experiences of two of the research teams in our study—the Ontario and the Vancouver teams. Even though both teams were working with the same participant demographics, the two teams had divergent experiences throughout data collection because of their specific local circumstances. On one hand, the Ontario team's experiences remained close to how the research project had been initially envisioned offering an opportunity to examine the difficulties in conducting longitudinal studies in general. Although the Ontario team ran into challenges recruiting participants initially, the larger population and the higher number of WISEs in Ontario enabled the team to still recruit enough participants using the original methodology, albeit taking more time. On the other hand, the Vancouver team had to make significant adjustments due to the lack of WISEs willing or able to participate. As a result, the two teams provide a contrast against how to maintain consistency and coherence for a longitudinal study that spans a vast country like Canada.

The objective of this article is to draw upon the data collection experiences and learnings of two of the regional research teams involved in this study to provide future researchers with insights into the methodological challenges and responding solutions for longitudinal studies covering multiple locations. This article documents the experiences the Ontario and Vancouver research teams as they encountered methodological issues prior to the onset of the pandemic and also the reflections on researchers' experiences during the pandemic (up until early 2022). These experiences highlight the challenges of long-term research where researchers must contend with not only a high level of inherent individual, spatial, and organizational variability over time, but also unexpected events that threaten to upend the research premise. The comparative account of the two teams highlights the importance of ongoing dialogue and collaboration to maintain the integrity of the longitudinal study combining quantitative surveys with qualitative interviews and observations. From this experience thus far, the researchers advocate that a balance between flexibility and consistency be deliberately incorporated into the design of multisite longitudinal studies inevitably faced with myriad challenges and complications such as the ones discussed in this article. This ambitious project is the first to examine the long-term outcomes of youth-centered WISE programs across Canada

and through reflecting upon the experiences of two research teams; this article aims to offer insights for future researchers who may conduct similar projects.

LITERATURE REVIEW

Cross-sectional research has shown that WISEs can have a positive effect with respect to building human capital (work skills) and social capital. However, cross-sectional studies rely on the assumption that individuals share similar experiences on a statistical basis. They do not reveal how individuals have changed over time. Longitudinal studies are no small undertaking and while longitudinal studies conducted within the social economy can provide useful insights into the significance of WISE training programs, conducting these studies presents considerable challenges (Menard, 1991). Although longitudinal studies can minimize the need for large-scale samples to control for cross-sectional differences, they still need a large enough initial sample, along with rigorous retention strategies, to ensure that the subsequent samples remain representative of the study population despite the expected and likely self-selective attrition of participants over time. For an integrated study like this one, regional research teams also had to ensure an ability to aggregate and analyze our data from all the different sites while simultaneously, needing flexibility in recruitment and retention, adjusting to the unique situations in multiple sites. Canada is a geographically vast country with many regional differences in terms of legislation, political culture, and the economic and social conditions that shape the contemporary social economy landscape (Elson, Hall, & Wamucii, 2016; McMurtry & Brouard, 2015). In addition to balancing consistency and flexibility in recruitment and retention, measures were put in place to ensure that youth participants could access the research instruments or tools (e.g., online surveys require access to the internet as well as an electronic smartphone or a computer) (Ribisl, Walton, Mowbray, Luke, Davidson, & Bootsmiller, 1996). The following section reviews the different strategies discussed in research literature covering participant recruitment and retention as well as research instruments for longitudinal studies over multiple sites with marginalized participants.

Recruitment

One of the considerations for recruitment in a study such as this is pre-inclusion attrition, which occurs when certain participants may have been unintentionally excluded from the baseline despite researchers' best efforts to design an inclusive and accessible study (Flick, 1988). In longitudinal studies, such exclusion could be exacerbated through repeated measurements, thereby further reducing the data's statistical representativeness (Flick, 1988; Knight, Fast, Debeck, Shoveller, & Small, 2017). For studies such as this involving participants facing barriers and marginalization, the focus on participants with higher-risk experiences can end up excluding those at lower risk resulting in over-reporting social "problems." For instance, a study of young people's experiences in Vancouver's inner-city drug scene illustrates the effect of pre-inclusion attrition (Knight et al., 2017). The initial sample recruited by Knight et al. (2017) consisted of a disproportionally higher number of youth participants living in high-risk circumstances because the recruitment approach did not reach youth less entrenched within Vancouver's inner-city drug scene. Consequently, the study was unable to accurately provide the full spectrum of experiences felt by youth at various levels of entrenchment within Vancouver's drug scene (Knight et al., 2017). Pre-inclusion attrition can also have the opposite effect where more settled youth participants who have access to technology or

are capable of remaining active in the program may have higher representation in the sample, thereby minimizing or falsely inflating the impact of the WISEs upon its youth. Ultimately, for research studies working with participants dealing with marginalization, the collection of a non-exclusionary baseline sample is contingent upon multiple factors. Avoiding pre-inclusion attrition can be addressed through varied recruitment efforts such as on-site visits or online (e.g., email invitations) which make the project accessible to participants. This can be further supported by a mixed-methods design that offers multiple ways for participants to partake in the study (e.g., surveys, interviews, and walkalongs). In addition, especially for historically over-researched communities such as Vancouver's Downtown Eastside (DTES), creating a motivating project with long-term benefits for the community going beyond individual compensation and policy reports is essential and was a value echoed by many youth participants (Linden, Mar, Werker, Jang, & Krausx, 2012; Wright, Allen, & Devine, 1995).

Retention
After recruitment, participant retention and attrition are specific concerns during longitudinal studies, especially for studies working with transient communities. High attrition rates during a longitudinal study could lead to insufficient and/or inadequate data points for statistical analysis and ultimately distortions in the measurements of change in participants (Roche, Clery, Carter, Dora-Laskey, Walton, Ngo, & Cunningham, 2018). Of particular concern in retention over a long timeframe is non-random post-inclusion attrition, which occurs when initial participants with certain characteristics drop out, such as those facing high mobility or social barriers (Dubow, Aber, Betancourt, Cummings, & Rowell Huesmann, 2017; Flick, 1988; Howard, Krause, & Orlinsky, 1986). Post-inclusion attrition reduces external validity when those dropping out of the study are disproportionally affected by external factors such as poverty, substance abuse, and mental health issues. If post-inclusion attrition is biased against only certain participants, researchers could be misguided by interpreting the results incorrectly and the statistical analysis would fail to accurately attribute the differences found in the variables to the intervention or to the differential participant dropout (Cook & Campbell, 1979; Flick, 1998).

To maintain the overall representativeness of the sample over time, researchers use regimented follow-up protocols (Roche et al., 2018; Wright et al., 1995). In a two-year study measuring the prevalence of substance use and violent injury among participants aged 14–24 who sought emergency care, Roche et al. (2018) used anchor points to stay in contact with the participants. In a study of 670 participants who were experiencing homelessness and substance abuse in three-month intervals, Wright et al. (1995) also used anchor points as part of data collection. The anchor points were defined as verifiable channels of contact to reach participants, including phone numbers, email addresses, physical addresses, alternative methods of contact, and contact information of family members or significant others. The researchers in both studies verified contact information with participants within 24–48 hours after the initial recruitment intake. Over the rest of the study timeframe, the researchers regularly contacted the participants through various channels between follow-ups.

In the event that no communication channels and points of contact are viable, researchers can contact participants via alternative methods such as home visits, leaving letters at local shelters/soup

kitchens where the participants are known to frequent, sending handwritten notes, and reaching out to listed family members or significant others (Roche et al., 2018). In the two-year study by Roche et al. (2018), the researchers report that their intense and rigorous procedure produced impressive follow-up rates of 85, 84, 84, and 85 percent at 6-, 12-, 18-, and 24-month intervals, respectively. While clearly effective, these follow-up procedures require substantial time and financial resources and can potentially make participants feel under surveillance.

Data collection procedures and processes
In any research study, choices about data collection procedures and processes both enable and limit who participates. For example, when participants have limited or inconsistent access to cellular services, landlines, and/or data/internet plans, research tools only accessible in these forms (e.g., online questionnaires and e-transfer payments) would make it difficult for participants to continue their involvement in the study regardless of their intentions. A variety of data collection procedures and instruments can help minimize the exclusion of participants who may lack access to communication technologies. Using a variety of different access points (e.g., on-site/off-site, in-person/over the phone, online/paper survey) can better accommodate the diverse needs of a study population (Dubow et al., 2017). Likewise, for studies that prioritize quantitative data collection, the addition of qualitative data collection measures such as interviews and field observations allow participants choices in how they engage and partake in the research (Dubow et al., 2017).

Overall methodology for the longitudinal study
This 5-year longitudinal study on youth participants who had partaken in WISE training programs was based on a mixed-methods design using survey questionnaires supplemented by qualitative data collected through semi-structured and ethnographic interviews as well as in-situ observations. The data collection spanned four years from 2018 to 2022, which included a baseline (BL) survey collection (2018–19) and was followed by three subsequent years of annual follow-up surveying. Funding of the study, which was provided by Employment and Social Development Canada (ESDC; for the Ontario team) and the Social Sciences and Humanities Research Council (SSHRC; for the rest of the regional research teams including Vancouver), involved a 5-year research grant which allowed for a 3-year follow-up timeframe. The 3-year follow-up period provided researchers with enough time pre- and post-data collection to conduct piloting and prepping as well as reserving time at the end for data analysis and reporting. This section provides an overview of the methodology for the longitudinal study which serves as the basis for the discussion in the next section on the specific experiences of the Ontario and the Vancouver teams.

This study sought to recruit youth participants aged 17–35 who had recently received or were receiving workplace training from WISEs at the time of BL. Initially, the age parameters were set to be 18–30, but at the request of some participating WISEs, which were more flexible with their age eligibility criterion for programming, the age range was expanded to 17–35 to be inclusive to all their training participants. Since the aim was to maintain a sufficiently large sample size of participants for three years (many of whom typically had sporadic involvement with the WISEs), it was necessary to have a robust sample of BL participants in preparation for the anticipated attrition over the follow-up timeframe, which could result in statistically irrelevant sample sizes (Lankenau, Sanders, Hathazi, & Jackson Bloom, 2010; Roche et al., 2018; Wright et al., 1995).

Baseline collection began in the early months of 2018, with the first surveys completed by youths who met the selection criteria, i.e., 17–35 years old and current participants or recent graduates of a WISE program. In each of the three years thereafter, researchers followed up with the participants from BL (some of whom remained as WISE participants and others not) using an annual survey tracking changes in their participation in the labour market as well as their personal, social, and economic life circumstances. To specifically assess the social benefits of the WISE programs for the youth participants, researchers measured individual participants' perceptions of wellbeing using a tool called the Asset Matrix, which asked participants to indicate any changes to their wellbeing from before entering the training program to the time when the participants completed each of the surveys. The matrix measures an individual's assets or strengths using 35 items, which are divided into five asset categories: financial, personal, access to services, physical and mental, friends and family. This Asset Matrix was adapted from the Sustainable Livelihoods model produced for international development work by the UK Department for International Development. This is a simplistic yet holistic approach to understanding the complex causations of poverty and provided researchers a way to understand and measure program outcomes through multiple aspects of the participants' wellbeing (Chambers & Conway, 1992).

The study was also supplemented with qualitative data collected during each annual follow-up cycle using in-depth interviews with an approximately 10% subset of the participants who were randomly selected. The interviews would provide further nuances of the participants' situations and details on how their circumstances might have changed since their participation in the WISE programs. This survey-interview combination was repeated each year with participants to collect multi-year data to examine changes that the participants would experience after taking part of training programs at WISEs.

Experiences of the Ontario and Vancouver teams
As an integrated study across multiple locations, it was intended to follow the overall methodology for the longitudinal study across the regional research teams, including using the same research instruments supporting data aggregation and analysis later on. At the same time, allowances were needed for differences in recruitment and data collection approaches in response to local circumstances. For instance, as will be discussed in this section, the Vancouver team struggled to achieve a large enough sample for BL and therefore, due to concerns of participant attrition, the team shifted its data collection efforts to conducting interviews with every participant. The Ontario team with a sufficiently robust BL sample followed the initial goal of interviewing only a 10 percent subset of their participants. Such experiences and adjustments undertaken by the regional research teams highlight the need for flexibility within recruitment and data collection activities over time in accordance with local situations.

Figure 1 presents the timelines for BL collection carried out by the Ontario and the Vancouver teams and the two subsequent years of follow-up surveying. The two teams proceeded with data collection in deliberately staggered timelines, allowing the Ontario team to first test the data collection approaches, which were then adopted and adapted with any necessary adjustments by the Vancouver team. This section outlines the recruitment, retention, and research logistics experiences by the Ontario and Vancouver teams.

Figure 1. Timelines for BL collection
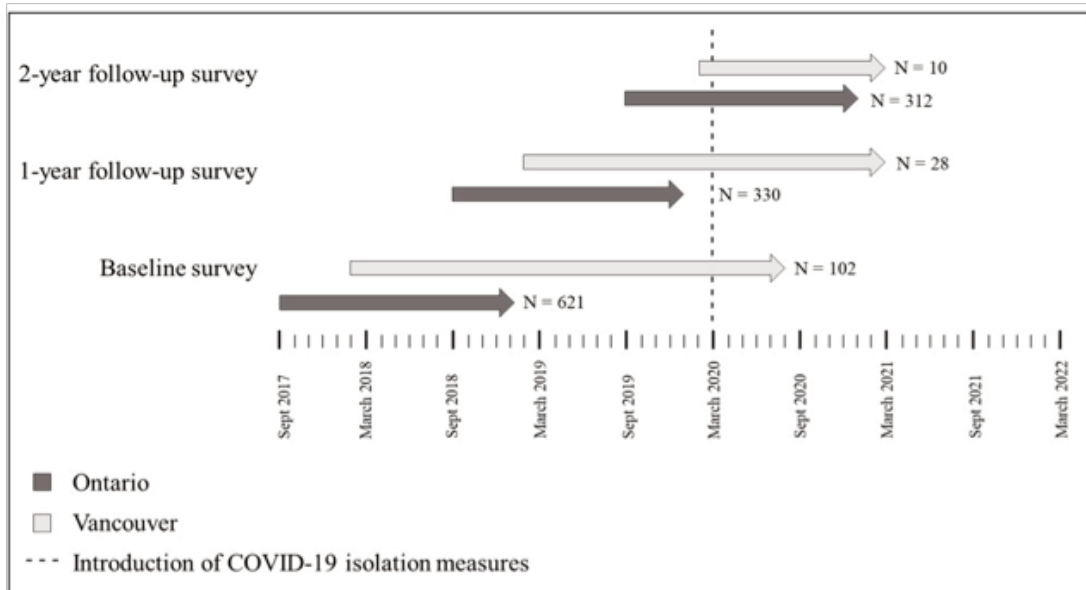
During the design stage of the study in 2017, both teams recruited local WISEs to participate in the study. The WISEs in this study varied greatly in terms of their programs training objectives, target youth populations, and modes of instruction delivery, but they all shared the same objective of preparing program participants for future long-term employment. For instance, some WISE programs use a formal classroom-based approach to teach computer and software skills such as how to operate Microsoft Office Suite or email etiquette. Other WISE programs use informal instruction such as group drop-in sessions to teach life skills such as goal setting, work-place norms, résumé and application writing, job searching and interview preparation, financial budgeting, managing addiction, nutrition, personal grooming/hygiene, and certification training (including serving alcohol, first aid, and food handling).

Using the Canadian National Social Enterprise Sector Survey and their own knowledge of local programs, the regional research teams created a roster of WISE programs that met the inclusion criteria to recruit WISE programs for the study. For instance, the Vancouver team used two eligibility criteria to recruit WISEs for the study: 1) the WISE needed to provide training for at-risk youth for workforce integration; and 2) the WISE needed to operate within Vancouver's urban centre. Despite the straightforward criteria, the Vancouver team's experience of recruiting participating WISEs turned out to be difficult and tumultuous. The team's request was consistently refused by staff at multiple WISEs. The basis of their refusal primarily stemmed from a feeling that their organizations, programs, and clients had been over-researched in the Metro Vancouver area. Others cited lack of program fit into the overall study, specifically around age and foreseen client disinterest. Further complicating the situation was the fact that some of the WISEs that had previously agreed to be part of the study were forced to drop out because of program closure resulting from funding insecurity. To a lesser degree, the Ontario team had a similar recruitment experience but was able to recruit additional WISEs as replacements. The dropout of the initial WISEs was also problematic because the research teams had consulted with the original participating WISEs for the research design. However, such consultations could only be ad-hoc with the WISEs that were later recruited.

Trying to recruit WISEs without being able to offer them the opportunity to contribute to the research design may have exacerbated the difficulty in the recruitment efforts.

This plethora of challenges caught both teams in Ontario and Vancouver unprepared despite awareness of the precarious funding circumstances of WISEs. Through scouring their networks, both teams worked to identify new organizations that would potentially have eligible participants for the study. The Ontario team managed to replace the WISEs that had dropped out and ended up working with three of WISEs. The Vancouver team was able to secure one replacement organization, which unfortunately did not yield many participants. Ultimately, the Vancouver team settled for working with only two of the original seven organizations that had joined the study. Having a much smaller pool to recruit participants from, the Vancouver team recognized early on that recruitment and retention were going to be ongoing challenges throughout the study. The resulting discrepancy in BL and follow-up survey collection between the Ontario and Vancouver teams is presented in Figure 1.

Once the teams had settled with the partner WISEs, our next task was to recruit youth participants. Relying heavily on the advice of partner organization staff, each team implemented their own recruitment practices to cater to specific organization needs emphasizing the importance for local flexibility. While the WISEs in Ontario actively assisted in the recruitment by allowing time in their training program for completing the survey and talking about the importance of the research project, the WISEs working with the Vancouver team could only offer space access. This means that the Vancouver team needed to directly recruit the participants. As a result, the Vancouver team relied on two distinct recruitment strategies to accommodate the differences in the WISEs' objectives and their clients. One was a passive recruitment method where program staff posted flyers in their offices and forwarded an email invitation to potential participants to complete the survey online. The other—slightly more active—involved hosting onsite recruitment sessions every 3–4 months where the research team would meet potential youth participants in-person. The specific scheduling of these recruitment sessions matched the busiest times of operation at the organization, such as its Youth Action Committee (YAC) meetings, the issuance of social assistance cheques, and the end of the workday. Further incentive for youth included the offering of pizza and soda by the researchers. During BL collection, attendance at these sessions ranged from the highest attendance of 11 to the lowest of two. In response to low recruitment during 2018, the Vancouver team extended its BL recruitment throughout 2019 into the second year of the study. This not only allowed the Vancouver team to continue recruiting BL participants, but the team was also able to follow up in-person with the youth participants to complete a one-year follow-up survey and/or update their contact information.

While the Ontario team had little trouble reaching the desired number of youth participants within the project timeframe for BL, the Vancouver team continued to struggle mainly because of the low and inconsistent number of participants at their two partner programs. One of the two programs the Vancouver team worked with used a revolving intake with no formal attendance or participation requirement. This flexible approach was specifically designed to serve youth facing severe barriers, many of whom were street entrenched and/or homeless. Conversely, the other program the Vancouver team worked with resembled a more conventional WISE training program supporting

youth who were transitioning out of care to prepare for workforce integration. The second program in Vancouver was similar to those working with the Ontario team, where participants attended formalized classroom training. This structured setup supported the researchers' ability to consistently meet the participants face-to-face, whereas the flexible environment required the researchers to employ a mixed approach to recruitment.

Retention
The task of retaining the youth participants in this study over the course of three follow-up years was an anticipated challenge as part and parcel of longitudinal research design. Using contact information collected in the BL survey, the Ontario team started their follow-up procedures with an online survey six months after BL in the summer of 2018, whereas the Vancouver team only started following-up with participants one year after 2019 due to different project funding arrangements. As soon as the follow-up efforts started, both teams ran into issues where contact information was incorrect or no longer valid. Another issue was less than perfectly legible handwriting from the paper version of the BL survey (e.g., misspellings of names or email addresses). Although additional anchor or contact points were collected in the BL survey, following the strategy of Wright et al. (2018), they were only useful if they were legible, and a small portion of Ontario's BL participants were never re-contacted for this reason.

Each month, the Ontario team initiated the follow-up cycle for the participants with an invitation to the online survey by email. Following the email, the team contacted the participants by phone which turned out to be effective in getting the participants to complete the survey. Although the retention rate over BL at six-months was only approximately 50 percent (considerably lower than the planned 75 percent), the one-year survey achieved a 92 percent retention rate over the six-month survey. From this, the Ontario team surmised that the consistency of the follow-up process established the project in the minds of the participants and gave extra motivation for the participants to continue (Roche et al., 2018; Wright et al., 1995). Consequently, the larger sample recruited consistently every month allowed the Ontario team to establish a regular follow-up cycle and approach to enhance retention.

Because of the lower-than-planned retention at six-months in Ontario, the Vancouver team initiated a check-in procedure with BL participants to ensure up-to-date contact information. For the participants in Vancouver, email was the preferred method and the six-month contact rates ranged between 35 and 50 percent, which may be attributable to instability with communication channels, a challenge faced by marginalized youth. For example, one participant said that she did not have an active phone number or data plan, but she could connect to Wi-Fi making email the preferred, albeit inconsistent, means of communication.

Research methods and logistics
While both teams collected quantitative and qualitative data, the two teams deployed different approaches to maximize the accessibility of the study for participants. The Ontario team opted for paper BL surveys administered in person during the training sessions conducted at the partner organizations. The paper survey was convenient because it eliminated the need for computers and email addresses ahead of time to send the survey link. The in-person format also allowed for a more active recruitment effort and immediate cash or gift-card payment upon completion of the

survey, which reduced the administrative burden for the research team and for the partner organizations. Similarly, the Vancouver team used both a paper and online format and regularly visited the WISEs to raise awareness of the study.

During the follow-up stages, the Ontario team switched to an online format for the survey because of the unwieldy scope of inviting a mobile and disperse participant pool to join in-person survey sessions at a single site (which turned out to be prescient in that the pandemic would have required the project to pivot online regardless). If the follow-up survey would take about 20–30 minutes to complete, there was little incentive for the participants who may have to travel for an hour to the single site to participate. The extra time required would also make the compensation for participation much less attractive. In addition to the follow-up surveys, the Ontario team also used interviews to supplement the large quantitative dataset by reaching out to approximately 10 percent of those who completed the follow-up surveys. The questions covered further in-depth discussion on how the participants' experiences had evolved since the training programs.

Given the low participant numbers, the Vancouver team shifted to refocus on qualitative data collection while maintaining integrity to the initial study design involving multi-phase quantitative and qualitative, sequential, and concurrent data collection. The Vancouver team conducted repeated ethnographic interviews and observational interactions with as many of the small sample of participants as possible. Ethnographic interviews complemented the survey data and allowed the research team to examine aspects outside of closed-ended survey questions, ultimately shaping a deeper, more complex understanding of the participants' lives. The team used open-ended questions to offer participants the opportunity to speak candidly about topics not captured in the survey, including past work and life experiences, future goals, and social relationships. This additional data regarding the impact of the training programs created narratives of what the participants were learning from both their experiences in the training programs and their subsequent efforts at workforce integration. Narrative portraiture is constructed from the standpoint of researchers, but the process can be transparent and methodological (through the use of thematically coding the data) and result in an authentic representation of the participant. Narrative portraiture is the stories behind the numbers and where hidden areas of participants lives—the internal thoughts and rationales—are found (Dixon, Chapman, & Hill, 2005). Going beyond descriptive analysis, participant portraits will enable the Vancouver team to examine data at the micro level and provide insight into the complexities and the often-overlooked contextual subtleties of participants lives. Coordinating data from ethnographic interviews and surveys collected over multiple years, the Vancouver team can create participant portraits that dive deep into the subjects' lives and utilize material that eludes the scope other forms of analysis (Stake, 1995; Smyth & McInerney, 2013).

However, an approach such as this is not without its critics and Yin (1984) points to three weaknesses:

1. Researcher views may influence the findings if a rigours analysis is not conducted.
2. Generalization is not possible if the sample size is too small.
3. Produces large amounts of descriptive data that is difficult to organize and manage.

To some extent, the researchers' experiences throughout the years of this study point to some of these critics, but it is understood that these vignettes are not generalizable. Instead, they can be used to contextually support and give voice to the youths' unique experiences and appreciate how participation in WISE programs is entangled in multiple aspects of a participant's life. Qualitative data is sometimes devalued when compared to quantitative data's generalizability; however, participant portraits rich in contextual description have their own inherent and unique value to contribute to the data set. Through following structured protocols to create participant portraits combined with statistically relevant findings sourced from surveys, the researchers will be capable of contributing unique insight regarding the impact of select WISE programs in Vancouver, Canada. Rather than aiming to generate statistic representativeness, the Vancouver team's inclusion of qualitative data aided in saturating the data collection with case profiles and experiences (Small, 2009).

Prior to the pandemic, walkalongs also allowed Vancouver researchers to observe the everyday lived experiences and social interactions of youth participants within the context of their work environment. It was especially appropriate for the participants of a WISE program that involved performing sweep services for the City of Vancouver and Coastal Health Services. The Vancouver team piloted one walkalong in the Fall of 2019; although the experiences of one key informant were not representative of all participants, the walkalong provided valuable insights for the study. In this instance, the researcher used pre-set discussion topics and walked along with the participant during their work shift. During the walkalong, the researcher also collected fieldnotes that were later reviewed, revised, and thoroughly detailed. Some preliminary findings from this initial walkalong highlighted the significance of ownership of knowledge and skill, and the ability to practice skills and behaviours. This example suggests that walkalongs could serve as a valuable tool to investigate embodied experiences of youth participants and their feelings mediated by external conditions, thus supporting researchers' understanding of the effects of the training programs and holistic-based insight into the participants' lives. Despite the benefits of the walkalongs, the Vancouver team had to address the potential surveillance concern that might cause anxiety among the participants. Prior to the COVID-19 pandemic, the team had been conducting BL recruitment and follow-up surveys on-site. Knowing that site visits and the physical presence of researchers in the participants' environment could deter them from accessing the space and services, the Vancouver team mitigated the effect of the seemingly "overbearing researcher" through moderated on-site visitation and consistent scheduling with program staff. When working with marginalized communities over an extended period of time, this seemingly minor factor must be considered (especially within WISE using the harm reduction model) so they remain safe spaces accessible to youth. Unfortunately, due to time constraints and pandemic-related university research protocols, the Vancouver team was unable to resume additional qualitative data collection activities such as walkalongs for the remainder of the study (Carpiano, 2009; Skov, Lykke, & Jantzen, 2018).

While a seemingly purely logistical component in a research study, the mechanics of participant compensation was an important element of research planning and should be addressed early on, especially in a study spanning multiple years, sites, and forms of data collection (Kubicek & Robles, 2016). Within this study, the logistics around paying compensation to participants unexpectedly required significant consideration for both research teams. Consulting with partner organizations, the teams first decided an appropriate compensation amount and then developed the compensation

type/form primarily taking into consideration how the survey was completed (in-person or online) and the banking accessibility of youth. In Vancouver, the amount of compensation for a survey, interview, or walkalong was $20, which was consistent with expectations of both university research ethics and the youth (many of whom frequently participated in social research studies and had expectations regarding study compensation). Upon advice from WISE staff, instead of cash payment, Vancouver initially offered a selection of gift cards to businesses such as London Drugs, Subway, and Tim Hortons. The reasoning for this was threefold. Firstly, staffers cautioned against cash payments and advocated for gift cards as the gift cards could contribute to grocery or other basic needs. Secondly, banking services and features such as e-transfers were unlikely to be universally accessible to the youth participants and therefore would not provide an equitable means for compensation. Thirdly, WISEs encouraged us to provide participants an opportunity of choice since members of marginalized communities accessing social services often had many aspects of their lives dictated to them. However, after a few months into the study, the Vancouver team realized this compensation practice was unsustainable and lacking practicality. Firstly, certain gift cards were more popular than others leaving the research team unable to consistently offer a standard selection. Secondly, participants who completed surveys online had no means to choose—there was not a survey question in this regard that necessitated the researchers to choose for the participant. By the second year of the study, the Vancouver team decided to only offer $20 London Drugs gift cards for renumeration, which was still well received by participants as this store sells a wide range of commodities, including food and personal care products, as well as was noted by a couple of participants, "we can get smokes there."

The Ontario team also consulted with the partner organizations to determine an appropriate renumeration amount. Staffers noted that the youth often received survey invitations from university and community researchers and that there was a general sense of survey fatigue among those in WISE programs. Ultimately, the Ontario team settled on a starting compensation rate of $40, which was increased to $60 as a result of the steep drop-off in response rate during the first follow-up survey. While the Vancouver team continued using gift cards, the program staff in Ontario recognized the participants' preference for cash and advised the Ontario team to switch to all cash for the BL surveys, which were completed in-person and e-transfers for the follow-up surveys that were completed online. However, the preference for cash/e-transfer presented a challenge for the university administrative process. The researchers needed to use their own funds to pay the participants first and then submit claims for expenses, which created an unexpected (and perhaps unreasonable) burden on individual researchers. Towards the end of the study, the Ontario team started working to amend this with the university's research office via cash advances drawn against future research fund installments.

DISCUSSION

Since late 2021, as the project started to wrap up its final follow-up surveys, we reflected on our accounts of the Ontario and Vancouver experiences in terms of data collection. We identify three research design and methodological considerations for similar studies in the future. These insights have contributed to the progression of the study and aided in maintaining integrity to the study's original objective—which was to establish a nation wide understanding of the long-term impacts of WISE employment training programs upon youth in Canada.

The precarious situation facing research participants, in this case youth and WISEs, challenges research design
The precarity we observed as experienced by both WISEs and youth participants involved in the employment opportunities training programs speaks to the larger context of the challenges facing the sector and the population. It is important to balance the need to incorporate stories of youth and WISEs into policy discussion with how data collection also adds to the burden and the stress felt by the research participants. Flexibility in collaborating with research participants is especially important for partner organizations dealing with chronic understaffing. Researchers must seek and listen to the advice of the partner organizations and respect their expertise in the field. The benefits of participating in research also need to surpass the vague notion of contributing to the future greater good and include material support in reciprocity (e.g., meaningful payments for the efforts of partner organizations and participants even though it is unlikely that the monetary compensation comes close to adequately compensating the time and effort of the program staff and participants). For future studies, it is suggested that multiple research teams include planning for different scenarios that may surface for different teams. The exercise of scenario planning could help researchers identify the core elements that should not be changed and also those that could be adjusted. In this study, the core element was the survey questionnaire to track changes over time while we could be flexible with the interview component. Early discussions on such methodological issues could reduce the pressure to respond to changes and adjust hastily.

Even the best laid plans need to include flexibility and creativity in response to unexpected global events as well as site-specific socio-cultural, political, and economic conditions while managing divergence in datasets.
The researchers' experience in this study shows that it is impossible to foresee what could happen over the years in a longitudinal study. Not only did researchers need to adjust the methodology to accommodate site-specific circumstances since the beginning of the study, but the global pandemic also brought forth the question of whether they could continue to study the impacts of WISEs on the labour market and on the youth participants. While maintaining consistency among some core elements is important to preserve the integrity of an overall study design (in this case the use of the same survey questionnaire), how exactly to gather the data needs to be flexible to specific sites, especially when the participants responded to the pandemic differently in different locations. For instance, the Vancouver team's reliance on supplemental qualitative data helped to offset the disadvantages of a small sample of participants in Vancouver while offering new areas of investigation. The ethnographic data collected by the Vancouver team are expected to provide insight into different participants' experiences, further informing the quantitative data set. Even though public health measures during the pandemic forced the Vancouver team to suspend walkalongs, the team was able to pivot in-person ethnographic interviews to phone and zoom interviews.

From the experiences of our two regional research teams implementing supplementary qualitative data collection methods, we continue to advocate for a flexible methodological approach to support the viability of long-term data collection instead of forgoing the opportunity to examine impacts over time for the purpose of maintaining a rigid quantitative data structure. Our experiences indicate that creative approaches to accommodate the unique local situations do not compromise the con-

sistency in the overall study design. In this sense, consistency does not necessarily mean rigid uniformity across project sites. Through a variety of research tools such as surveys, in-depth interviews, and walkalongs using various media (i.e., on-site/off-site, in-person/phone/online), we are managing to encourage engaging participation and create the opportunity for a rich portrait of the participants' experiences (Dubow et al., 2017). Again, advice and insights from partner organizations are critical in ensuring success in reaching and retaining participants. For instance, the Vancouver team worked in close collaboration with one of their two primary participating organizations to ensure the study best accommodated participants. Thankfully, pandemics do not happen in any great frequency. That said, unexpected events could still happen and the long timespan of longitudinal studies makes the likelihood of something happening high. Therefore, in case anything unexpected leads to abrupt stoppage, we suggest future researchers prepare for alternative data collection instruments (such as online) and approaches.

Logistics, although rarely discussed as part of methodology, have a considerable impact on longitudinal study design and data collection.
Practicality is always a consideration in conducting research, and in longitudinal studies such as ours, logistics take on a different level of complexity when data collection approaches have to be repeated for hundreds of participants over several years. Again, the logistics for recruiting and retaining participants for both locations in our study were the result of our discussions with staff and youth participants of the partner organizations. We were surprised how much effort was needed to navigate the administrative processes at the universities where our teams work. During the pandemic, our own lives and routines were also uprooted adding further complications to the already complex study. While these processes may not be apparent to participants, researchers need to understand how their individual institutions operate before committing to any specific logistical procedures. We hope that by sharing details of our logistical challenges in this article, researchers may be better prepared in their future studies. From our experiences, logistics should not be afterthoughts. Also, logistics are not just ethical approvals. Future researchers should spend time and effort to investigate the specific procedures of their institutions to ensure that research study proceeds smoothly and does not get held up because of unplanned logistical steps.

CONCLUSION
This article shows that with a flexible approach, the inclusive nature of mixed methodology within a longitudinal study covering a large geographical area is adaptable within various global, social, and cultural contexts. As this multi-site, longitudinal research project continues through a global pandemic, researchers advocate for using mixed methodologies responding to local circumstances and changing environments. The flexibility needed to incorporate different approaches within this study has not only avoided jeopardizing the overall consistency and integrity of the data collection, but it has also supported the generation of a rich dataset that accommodates site-specific institutional, organizational, social, and economic variations.

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