

# The Organizational Research Context: Properties and Implications

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## INTRODUCTION

The field of organizational research displays three trends: widening boundaries, a multiparadigmatic profile, and methodological inventiveness. Choice of research methods, shaped by aims, epistemological concerns, and norms of practice, is thus also influenced by organizational, historical, political, ethical, evidential, and personal factors, which are typically treated as problems to be overcome. This chapter argues that those factors constitute a system of inevitable influences, and that this contextualization of methods choice has three implications. First, it is difficult to argue that methods choice depends exclusively on links to research aims; choice of methods involves a wider, more complex, interdependent set of considerations. Second, it is difficult to view method as merely a technique for snapping reality into focus; choice of methods frames the data windows through which phenomena are observed, influencing interpretative schemas

and theoretical development. Third, research competence thus involves addressing coherently the organizational, historical, political, ethical, evidential, and personal factors relevant to an investigation.

### *Methods out of context*

Choice of methods tends to be presented as a step in the research process between setting objectives and commencing fieldwork. Consequently, methods are characterized in terms of finding the 'appropriate tool' in relation to research topic and questions. Partially accurate, this depiction decontextualizes method, providing an incomplete basis for explaining the approach deployed in a particular study. This chapter aims to demonstrate how choice of methods is shaped not only by research aims, norms of practice, and epistemological concerns, but also by a combination of organizational, historical, political, ethical, evidential, and personally significant characteristics of this

field of research. While often acknowledged as difficulties facing the field researcher, we argue instead that these factors are naturally occurring and unavoidable influences, which must be accommodated in decisions concerning choice of methods, as they cannot simply be overcome through diligent planning. This perspective locates method as an integral component of a wider, iterative, and coherent research system, influencing the social possibilities of data collection, as well as the substantive nature of data collected, and the nature and direction of theory development. Those organizational, historical, political, ethical, evidential, and personal factors are not just unwelcome distractions. They are core components of the data stream, reflecting generic and specific properties of the research setting, central to the analysis and interpretation of results and to the development of theoretical and practical outcomes. We thus portray the research process in a less linear manner than is typically depicted in textbooks, arguing that our alternative characterization more effectively captures the realities of research methods decisions, and that this perspective will be instructive for students and novice researchers

Our argument has three steps. First, to establish the platform for the argument that follows, we outline three significant trends in organizational research: the widening boundaries of this field, its multiparadigmatic profile, and its methodological inventiveness. Second, we consider the range of factors influencing methods decisions. Finally, we consider the implications of this perspective for the theory and practice of organizational research.

### ***Boundaries, paradigms, and inventiveness***

This section argues that organizational research has since its inception widened its boundaries dramatically, has developed (as other social sciences) a multiparadigmatic profile, and has been extraordinarily inventive with regard to the development of data

collection methods. A more restricted domain, with a broad epistemological consensus, would perhaps display less methodological creativity and present a narrower range of methods problems and choices. But the growth in popularity of mixed-methods research has problematized, if not ruptured, the relationship between epistemology and method, weakening confidence in, and preoccupation with, those links (Teddlie and Tashakkori, 2003; and see Bryman, chapter 30, this volume). Consequently, method is increasingly located in the context of wider and more fluid intellectual currents, discouraging rigid adherence to epistemological positions and encouraging a more pragmatic 'do whatever necessary', or 'pick and choose' approach to methods choice.

### ***Widening boundaries***

The term organizational behaviour was coined by Fritz Roethlisberger to suggest the widening scope of 'human relations'. So, in 1957, the Human Relations Group (previously the Mayo Group) at Harvard Business School was renamed the Organizational Behaviour Group, and organizational behaviour was recognized as a subject at Harvard in 1962, with Roethlisberger (1977) as the first area head. Research at that time focused on work design, motivation, job satisfaction, rewards, groups, technology, leadership, and performance. Four decades later, in the introduction to the first edition of their *Handbook of Organization Studies*, Clegg, Hardy, and Nord (1996) argued that the 'traditional' label no longer reflected the scope of the subject or captured the work of those outside business and management with an interest in organizational issues. We now see research in topics such as aesthetics, bullying, change processes, creativity, cross-cultural communication, discourse, e-commerce, emotion, empowerment, ethics, fear (and loathing), feminism, femininity, gender, harassment, innovation, institutions, language, learning organizations, masculinity, narrative, organizational memory, political behaviour, power, psychological contract, reflexivity, sexuality, storytelling, sustainability, symbolism, and

work-life balance. While this caricature of a once narrowly-defined field is inevitably unfair in some respects (the employee counselling programme at the Hawthorne plant, for example, addressed domestic and emotional concerns; Roethlisberger and Dickson, 1939), the argument concerning the broadening of boundaries is valid. It could be argued that our illustrative topic list is incomplete, and that the field of organizational research is now unbounded.

Researchers across this field also embrace diverse aims. Some are concerned to establish covariation, identify causal links, build models, and test hypotheses. Others are more preoccupied with rich description, capturing the complex texture of the organizational world as a valuable goal in its own right. For example, Goes and Park (1997) offer a compelling demonstration of the relationships between interorganizational networks and healthcare innovation, using methods (survey and published performance data), which reveal little or nothing of how those networks function or how they trigger and develop innovation processes. In contrast, O'Leary (2003) presents four competing narrative constructions, based on employee accounts from a newspaper company, depicting widely divergent perspectives on organizational life, using methods (participant observation and interviews) which reveal little or nothing of how those constructs and stories may be related to individual satisfaction, motivation, employee behaviours, management-employee relations, or organizational effectiveness. In one case, we see the links, but not the underlying mechanisms, while in the other, the mechanisms are displayed, but what these are connected to is unclear. These remarks are not intended as criticism of either of those contributions, but simply to illustrate the implications of contrasting research objectives and their coexistence in this field.

#### *Multiple paradigms*

The field of organizational research is no longer dominated or constrained by positivist (or neo-positivist) epistemology and

its extended family of primarily quantitative hypothetico-deductive methods (Campbell and Stanley, 1966; Cook and Campbell, 1979; Shadish, Cook, and Campbell, 2001). Relatively few researchers today support the notion of a fixed hierarchy of evidence, with the double-blind randomized controlled trial as the ultimate model of proof (Tranfield, Denyer, and Smart, 2003). Nor is it possible to capture the range of epistemological positions with the distinction between variance and process theories (Mohr, 1982; Langley, 1999; see Langley, chapter 24, this volume). Organizational research displays a variety of positivist, critical, phenomenological, constructivist, interpretative, feminist, and postmodern perspectives. Developing the work of Burrell and Morgan (1979) on paradigms, Deetz (1996; 2000) identifies four research orientations based on 'dimensions of contrast'. One dimension is 'local/emergent' versus 'elite/*a priori*', based on the sources of ideas and concepts, either in dialogue with respondents or established by the researcher on theoretical grounds. The second is 'consensus' versus 'dissensus', based on relationships between research aims and the dominant social discourse, with the aim either to confirm unity of understanding or to expose conflicts and tensions.

These dimensions produce four 'analytic ideal types' (Deetz, 1996, p.195; see Deetz, Chapter 2, this volume) or different ways of engaging in research. Deetz also observes interplay, as researchers are adept at 'dodging criticism by co-optation' of other orientations (but adherents to more or less extreme versions of these positions can disagree fiercely.). A normative (positivist) discourse assumes progressive enlightenment, rationalization and control, with concerns for codification, with establishing covariation and causal relations through hypothesis testing, with cumulative evidence, and with nomothetic laws (e.g., Hamel, 2000). An interpretative (constructivist, phenomenological) discourse regards sense-making individuals as engaged participants, as cocreators of social structures, using ethnographic and hermeneutic methods

to establish local meanings, grounded in social and organizational practices (e.g., Fincham, 2002; Huxham and Vangen, 2003). A critical (neo-Marxist) discourse views organizations as sites of political struggle. The research aim is to unmask modes of domination and distorted communication by showing how these are reproduced, to highlight how social practices and institutional structures create and sustain power differences, obscuring alternative perspectives (e.g., Knights and McCabe, 1998). A dialogic (postmodern, Foucauldian) discourse focuses on the role of language in the constructed and polyvocal nature of social reality. Organizations are viewed as disjointed narratives that fail to establish a coherent reality. Dialogic discourse seeks to expose the pervasive and fluid nature of power relations in contemporary society, to unpack taken-for-granted realities, to uncover their complexities, lack of shared meaning, and hidden resistances (e.g., Collins and Rainwater, 2003). When publishing, researchers are usually encouraged, implicitly or explicitly, to locate their work on such a map, potentially straddling more than one quadrant.

It is important to recognize that such a typology is a helpful organizing framework, but that other perspectives remain possible. For example, as Deetz notes, it is possible to combine or to co-opt orientations for different purposes. In addition, it can be argued that realist perspectives are not captured in this space at all (see Reed, Chapter 25, this volume).

#### *Methodological inventiveness*

The 'paradigm wars' of the 1980s have thus turned to 'paradigm soup', and organizational research today reflects the paradigm diversity of the social sciences in general. It is not surprising that this epistemological eclecticism has involved the development of novel terminology, innovative research methods, nontraditional forms of evidence, and fresh approaches to conceptualization, analysis, and theory building. Examples of inventiveness in method include the use of organizational stories (Boje, 1991; 2001; Barry and Elmes,

1997; Taylor, 1999; Kolb, 2003), narratives (Czarniawska, 1999; Pentland, 1999; Doolin, 2003), visual, pictorial, and photographic images (Meyer, 1991; Harper, 1994; 2000; Suchman, 1995; Emmison and Smith, 2000; Buchanan, 2001; Stiles, 2004), feature film (Foreman and Thatchenkery, 1996; Hassard and Holliday, 1998; Champoux, 2001; **Buchanan and Huczynski, 2005**), creative dialogue, drawings and art, poetry, and theatre (Broussine, 2008), discourse analysis (Dick, 2004), Internet-based or 'online' research methods (Fielding et al., 2008), and collaborative strategies involving respondents as coresearchers and cointerpreters of findings (Denis and Lomas, 2003; Heller, 2004). These innovations are particularly evident in the domain of qualitative and interpretative methods (Prasad and Prasad, 2000). Meyer (1991, p.218) observed that a 'burst of innovation' and a 'new pluralism in methodology' in organization science had not affected data collection methods; that criticism has now appears to have been addressed. Traditional preoccupations with representative sampling and statistical generalization have long been complemented by arguments for the value of small-n studies, and for the epistemology of the singular, based on naturalistic (Stake, 1994) and analytical generalization (Mintzberg, 1979a; Mitchell, 1983; Eisenhardt, 1989; Tsoukas, 1989; Dyer and Wilkins, 1991; Buchanan, 1999; Yin, 2003; Butler, 1997; Stake, 2000).

One reason for this paradigmatic diversity and methodological innovation is that this field is a meeting point for numerous disciplines—mainstream and political psychology, social psychology, sociology, ethnography, economics, public policy, history, anthropology, and the business areas of strategy, finance, marketing, human resources, and operations management. Each of these disciplines and related subdisciplines, brings its own distinct perspectives and traditions. Further, there is a growing acceptance, if not endorsement, of studies that combine quantitative and qualitative research. Such a mixed-methods approach potentially

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provides opportunities for greater insight than that can be achieved by one approach alone (e.g., Currall and Towler, 2003; Yauch and Steudel, 2003). This development further contributes to the sense of paradigm soup, as researchers using such approaches tend to set aside the epistemological and ontological divisions, and because this questions the appropriateness of traditional research quality criteria (such as validity and reliability), as well as qualitative alternatives (Lincoln and Guba, 1985). Consequently, the field is fragmented, with no central core of traditions, frameworks, and concepts, and no unified theoretical or practical proposal.

Trends in the field of organizational research thus include a widening of boundaries, adoption of a range of orientations (epistemologies), and methodological innovation. The following section locates method in the context of a number of other properties of the organizational research field, which can systematically, and unavoidably, influence choice of method.

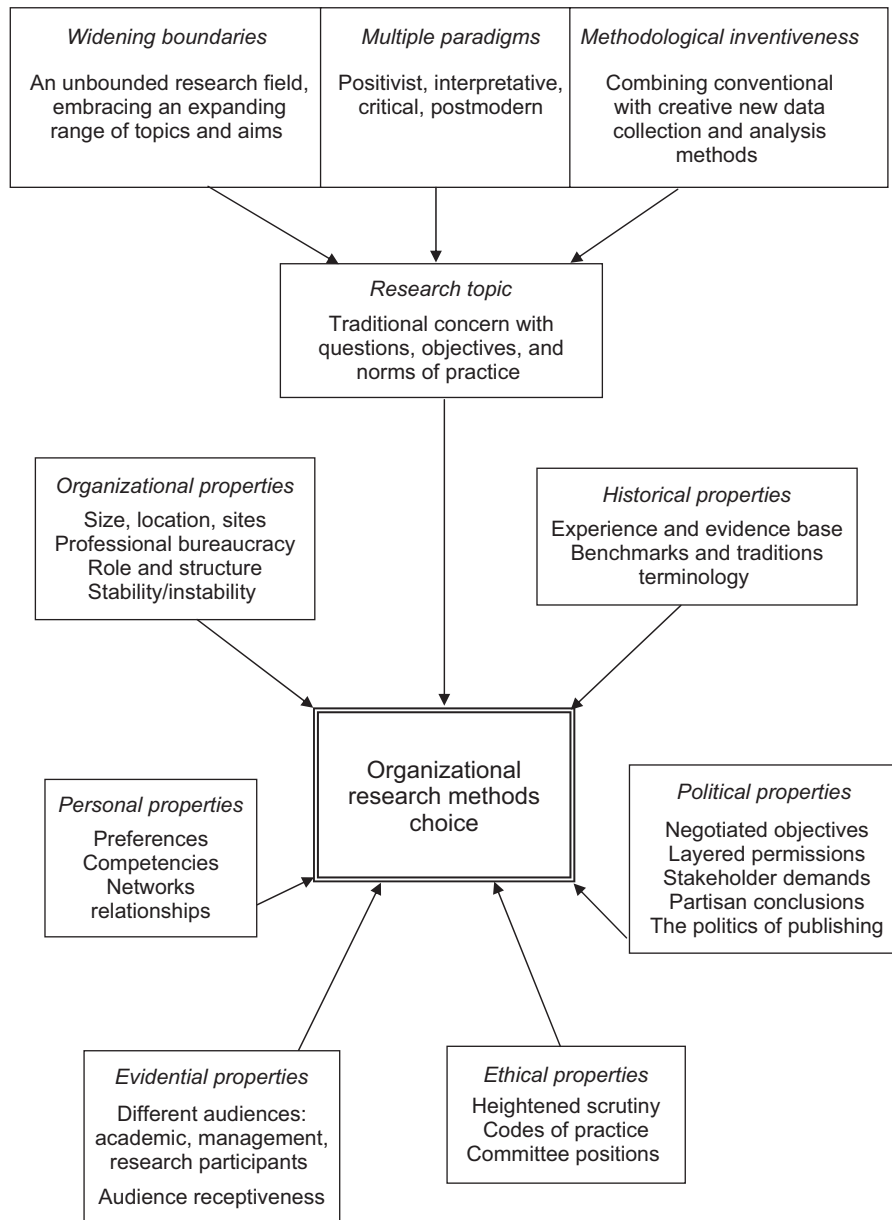
### ***Field properties***

While personal experience sits at the bottom of the hierarchy of evidence, to be treated with caution, if not discarded, it is personal research experience that informs this discussion. We consider features, challenges, and tensions that have coloured, indeed determined, our own methodological decisions, but which tend to be regarded as ‘problems’ in most accounts, not considered as legitimate influences on those decisions. In particular, we consider the organizational, historical, political, ethical, and evidential properties of the research field and the resources or personal properties of the researcher. Figure 1.1 summarizes this argument, illustrating the broad system of influences on choice of organizational research methods, beyond traditional concerns with the link to research topic, question, and objectives. In practice, this system of influences has multiple interrelationships, and the arrows

for presentational purposes indicate only the primary influences on methods choice.

### ***Organizational properties***

The logistics of fieldwork will always be more or less significantly influenced by properties of the focal organization such as size, location (single or multisite), and whether it is a commercial organization or a professional bureaucracy (Mintzberg, 1979b). Choice of method can also be heavily contingent on the stability of the research site or sites. Predetermined and inflexible methods are less appropriate (perhaps inappropriate) where the organizational context is changing. However, one significant contemporary feature of most medium and large-size organizations concerns the scale and frequency of role and structure change. For example, a tracking study of large British firms found that they experienced major changes on average every three years and that a third engaged in large-scale reorganizations annually (Whittington and Mayer, 2002). While such studies focus on the organizational repercussions (e.g., on the need to develop management skills in ‘adaptive reorganization’), they have implications for research method. For example, the simple question, ‘what is your job title?’, is often met with a bemused smile, as many managers have portfolios of responsibilities, which change frequently (Buchanan, 2003). Establishing a sampling frame, or a list of key informants, or constructing an organization chart, can be problematic. On several occasions, in different settings, we have returned within a matter of weeks to reinterview a respondent, to find that they have assumed another role, or set of roles, and that our line of questioning is no longer relevant. Growth in ‘outsourcing’ of key services and the development of network forms of interorganizational collaboration mean that members of ‘partner’ organizations may be unsure which organization or project they are being questioned about. Taking static measurements to establish covariation is of limited relevance, rendering process theoretical perspectives, based on contextualized event sequence analysis, more appropriate (Poole et al., 2000; Pettigrew et al., 2001).



**Figure 1.1** The system of influences on choice of organizational research methods

Depending on the research topic, the flux and patterns of change become substantive data observations, and the role of the researcher may be to ‘catch reality in flight’ (Pettigrew, 1990). In these kinds of rapidly changing organizational settings (Eisenhardt and Bourgeois, 1988; Buchanan, 2000), research methods must

be regularly reviewed and adjusted in a flexible manner, as initial plans become inappropriate and as fresh lines of inquiry become apparent. As discussed next, such flexibility is problematic where ethical guidelines require researchers to detail methods in advance and to adhere rigidly to those plans.

*Historical properties*

The history of a research field conditions contemporary methods decisions by providing an experience and evidence base, benchmarks, departure points, and traditions. Consequently, the ghosts of the Hawthorne studies continue to haunt researchers in the twenty-first century, having made durable contributions to research agendas, methodology, and terminology. In natural and biomedical science, new research builds on previous work, rendering it obsolete. Organizational research is rarely cumulative in this respect, and researchers ignore at their peril the historical record, the concepts and evidence from long-running research streams, and past contributions in their field. For example, although research into leadership traits was abandoned in the 1950s, following contradictory and inconclusive findings, similar studies still surface in popular, academic, and professional literature (Leigh and Walters, 1998; Charm and Colvin, 1999; Kamp, 1999; Department of Health, 2002). Organizational researchers may thus be advised to allow past experience, frameworks, conceptualizations, and findings, to influence contemporary choices of research focus and appropriate methods.

*Political properties*

As organizations are political systems (Mintzberg, 1983; Pfeffer, 1992), it is difficult for researchers to respect conventional norms of observer neutrality by avoiding entanglement in power and political issues (see Clegg, Chapter 9, this volume). Researchers are routinely engaged in political actions in at least four ways—when negotiating research objectives, obtaining permissions to access respondents, aligning with stakeholder groups, and when attempting to publish findings.

*Negotiated objectives*

Researchers often find themselves negotiating their objectives with the ‘gatekeepers’ who can sanction or block their work (Korczynski, 2004). A gatekeeper is anyone in a position to decide whether or not a research project

can proceed at a given site. From a methods perspective, this can be problematic, in at least two respects. First, in many organizational settings, the field researcher may be faced not with a single gatekeeper, but with many individuals who can either allow or deny research access. Second, the researcher may often (not always) have choice with regard to which gatekeepers to approach, choosing (say) the most senior or the one with whom they have the closest relationship; it may be politically unwise to approach more than one gatekeeper simultaneously. However, gatekeepers can make their consent contingent and the spirit of free inquiry is jeopardized when certain themes and topics are discouraged and others welcomed. One solution involves the overt description of a study in innocuous terms (a study of interpersonal relations and team dynamics) while wording data collection instruments to incorporate related themes (age, race, and sex discrimination in promotions), tailoring observations and document collection accordingly. This approach raises ethical concerns relating to appropriate degrees of openness and honesty on the part of the researcher, and the degree to which gatekeepers and respondents may be misled with regard to the researcher’s intentions, implying that fully informed consent may not have been given. For example, in their study of management perceptions of organization politics, Madison et al. (1980, p.83) argue that the topic is, ‘too sensitive for use in direct investigations’, and that researchers should cloak the term ‘politics’ with an appropriate euphemism (managers in this instance were asked to talk about their ‘total experience’ of work with several employers). In our experience, funding can be linked to the researcher’s willingness to address specific themes, questions, and problems in a particular manner. Failure to comply with such expectations has predictable implications for the success of research grant submissions, which may be magnified when funding bodies insist that organizational research access is secured before financial support can be released.

### *Layered permissions*

Organizational researchers can rarely approach respondents directly with requests to participate in their studies. Permission typically has to be obtained first from a senior management gatekeeper, who may often refer such requests to other senior colleagues and in some instances to a management committee or board. In turn, once a general warrant to proceed has been granted, unit or department managers may then have to be approached with further requests to access 'their' staff in a particular manner. Individual respondents can, of course, then refuse to collaborate, despite that cascade of management concessions. This layering of permissions has at least two consequences for method. First, this can delay the start of data collection, and second, this can again compromise research objectives and methods. Permission may be constrained in terms of the topics that can be investigated, the questions that can be asked, the materials that can be collated, and the timing and manner in which data collection is allowed to unfold.

### *Partisan conclusions*

One of the dilemmas of organizational research concerns the extent to which researchers align (or are encouraged by circumstances to align) their agendas with the interests of specific stakeholder groups. Support for managerial agendas, implicit or explicit, direct or indirect, attracts accusations of partisanship, captured by the phrase, 'servants of power'. As management permission is typically a prerequisite for organizational access, it is often difficult to avoid linking research aims explicitly to managerial interests, in a way that could potentially damage the interests of other stakeholder groups; for example, assessing process redesign options that would reduce staffing, skill, and payment levels.

Researchers are often asked to report their findings to those who granted access, as a form of *quid pro quo*, for providing documentation and allowing staff to be interviewed, to complete questionnaires, or to attend focus

groups, for example. Such reporting implies a tacit acceptance of managerially defined themes and problems. The consequences of failing to meet gatekeeper expectations in this respect can be damaging to the researcher's local reputation, may restrict publication of findings, occasionally leads to the censorship of reports, and can close that research site to other investigators. For example, O'Connor (1995) studied written accounts of change authored by internal organization development (OD) groups in a high technology manufacturing company. The texts praised the efforts of the OD function, whose members had authored the accounts in 25–30 page case studies, presenting the OD function and key individuals as 'pivotal' in change initiation and implementation. In her conclusions, however, O'Connor observes how 'involvement' in key decisions was limited to a small group of 'key' managers; how 'disagreement' was treated as resistance and lack of understanding rather than as 'involvement'; how change narratives revolved around a 'heroic' figure with 'adversaries'. The host organization did not welcome O'Connor's interpretations. Her gatekeeper denied her account, describing it as shocking, outrageous, and unacceptable, and never met with her again. Such a candid account is unusual, but almost certainly reflects a relatively common organizational field research experience.

### *The politics of publishing*

There is a further dimension to the presumed link between research questions and methods, concerning the wider politics of getting one's findings into print. In book publishing, most editors adopt an eclectic approach to their authors' epistemological standpoints, seeking variety in this respect for sound commercial reasons. However, such openness is less common in refereed journals whose editors often privilege particular epistemologies and forms of knowledge. Thus, Huy (2001) establishes his credentials as a normative managerialist commentator in a *Harvard Business Review* article, but identifies himself as an interpretative sociologist in *Administrative Science Quarterly* (Huy, 2002). Knights



and McCabe (1998) adopt a critical labour process perspective in *Human Relations*, but Knights (2002) establishes a postmodern identity in *Organization*. Such 'credentialling' is typically accomplished subtly through a combination of language use and appropriate referencing. To expose more clearly the artifice behind such stylistic manipulations, some authors have deliberately resorted to publishing their findings using several different 'voices' (e.g., Rhodes, 2001; Collins and Rainwater, 2003). Sutton (1997) argues that he has had to play down the significance of his qualitative data in order to get his papers published in journals that prioritize quantitative research, and that he has become a closet qualitative researcher, 'because some editors, reviewers, and journals remain unfairly biased against qualitative research' (Sutton, 1997, p.99). The quality of authors' arguments about the appropriateness of their research methods should resolve such disputes, were those decisions based just on links to aims. However, Sutton's experience suggests that bias against one orientation or another is sometimes so strong, and that researchers are disadvantaged, as editors and reviewers discount claims for the appropriateness of particular methods regardless of the cogency of the supporting case.

Further light on this issue is shed by Herman and Egri (2002) describing the background to their research on environmental leadership (Egri and Herman, 2000). In a revealing discussion about their research planning, they note that one of the main reasons they chose to combine their qualitative approach with a survey was that they 'understood that qualitative research alone would not satisfy many mainstream academics' (Herman and Egri, 2002, p.132). One of the traditional advantages of mixed methods research concerns the potential for triangulation combining quantitative and qualitative data streams in relation to the same issue. If methods flowed primarily from questions, researchers would not feel compelled to employ techniques they would otherwise prefer not to use. It is apparent that the politics of publishing pull investigators in directions which may be

'politically correct', but with which they may not always feel comfortable, observations that further undermine the textbook connection between research questions and methods.

The political dimensions of organizational field research mean that claims to observer neutrality, as across the social sciences, are hollow. Researchers are occasionally motivated not only to develop understanding, but also to challenge management practices, to trigger intervention, and to effect organizational change. Why investigate power if not to identify ways of addressing its consequences or to reduce power inequalities? Why study quality of working life or sexual harassment unless one wishes to improve the one and overcome the latter? Stakeholder alignment has fundamental, if rarely reported, implications for method concerning, for example, respondent selection, modes of observation, and lines of questioning, with respect to issues that are included and topics, which are considered beyond the boundaries of the study.

### ***Ethical properties***

Organizational research has attracted an increasing level of ethical scrutiny (see Bell and Wray-Bliss, Chapter 5, this volume). Several bodies (Academy of Management, British Sociological Association, British Psychological Society, European Market Research Association, Social Research Association, etc) have long-standing research ethics codes, although there is little or no evidence to suggest that those codes are even occasionally contravened. However, in Britain, the Department of Health (2001a; 2001b; 2001c; 2005) Research Governance Framework applies the standards for biomedical research (drug trials, new treatments) to organizational research in health and social care, even where patients or clients are not implicated. This involves a protracted application process policed by local and multisite research ethics committees, concerned primarily with issues of informed consent, right of withdrawal, and respondent anonymity. However, policy

guidelines clearly invite ethics review committees to challenge (and reject) methods choices, stating that, 'research which is not of sufficient quality to contribute something useful to existing knowledge is unethical' (Department of Health, 2005, p.13). In addition to traditional concerns, therefore, committees also consider aspects of method where, in their judgement, inappropriate choices may have been made. In our experience, an ethics review panel rejected a proposal for a study of management processes where the main data collection methods were scrutiny of documentation and observation of management committee meetings. Some members of those committees, the panel argued, could come under undue social pressure to consent to observation, which thus rendered the method unethical. In two other separate instances involving qualitative inductive multimethod case studies of healthcare service improvement initiatives, ethics committees challenged proposals for lacking precision with regard to sampling and questioning strategies, unimpressed by arguments concerning the need to adjust methods in a flexible manner during fieldwork, in the light of emerging themes, findings, and unanticipated organizational changes.

The open-ended nature of qualitative inquiry thus surfaces ethical concerns. Some research modes, such as grounded theory, discourage the specification of research questions in advance of data collection, privileging issues emerging during the investigation (Locke, 2001; see Goulding, Chapter 22, this volume). In America, institutional review boards (IRBs) make life difficult for qualitative researchers who advocate flexible methods in order that new questions can emerge and be pursued effectively. This has led to clashes between researchers and IRBs, which often employ biomedical research standards, prohibiting flexible methods on ethical grounds, because the investigator does not know exactly how the research will be done (Lincoln and Tierney, 2004). Lynn (2004) reports the case of an IRB, which successfully argued that a hospital quality improvement project, led by managers, but

leading to publication of the lessons derived, constituted research activity, and should thus have been subject to prior ethical review (a judgement, which, if applied consistently, would in Lynn's view present insurmountable barriers to most quality improvement projects). Moreover, the growing tendency, following the Belmont Report, for matters of research design, quality, and ethics effectively to become fused, magnifies the problem when biomedical criteria for research quality and ethics are applied (Sieber, 2004). These trends parallel the consequences of the British Department of Health Research Governance Framework (Truman, 2003), whereas the implications of the Belmont rules are much broader. Indeed, there are calls in Britain for the 'light touch' approach to ethical vetting in nonhealth fields to become more rigorous (Kent et al., 2002). The notion that research methods depend only on research questions is untenable when considering the open-ended nature of qualitative research, and the ethical context in which many researchers ply their trade, requiring them to mould methods to sometimes inappropriate criteria.

The increased intensity of ethical scrutiny is perhaps not surprising. There has been growth in public concern with the process and outcomes of all scientific enquiry, and researchers must be able clearly to justify their approach. Researchers must also comply with legislation concerning, for example, discrimination, privacy, and data protection, to protect themselves as well as informants. Some social and organizational research involves vulnerable respondents who deserve protection from researchers who may cause unwitting harm. Some social and organizational research focuses on controversial and sensitive issues, about which some respondents may be reluctant to speak openly, and where researchers must avoid exerting pressure on individuals to submit to a project's requirements.

Ethical scrutiny generates other challenges for method. It may not always be practicable to gain prior consent from every respondent likely to be involved in a study where some form of observation will be used, thus

breaching the principle of right to withdraw. Some researchers may be concerned about contamination by presensitizing respondents with knowledge of the research aims; this can be avoided by misleading respondents, breaching the principle of informed consent. In publishing, a researcher may be required to omit information, which, although relevant to the development of an explanation of the phenomenon under investigation, would disclose individual or organizational identity, breaching the principle of anonymity. We were once asked to omit discussion of a conference that had contributed to an organizational change process; participants had reacted unfavourably to the style and content of some presentations. However, several delegates were prompted by that experience to develop their own approach to the issues in hand, thus securing their commitment to the change agenda. Discussion of this incident was proscribed, because it would 'unnecessarily embarrass the conference organizers, who had already learned from that mistake'.

The spotlight of ethical scrutiny is currently focused on the proposal stage. Should the research process as a whole become subject to ethical monitoring, as has been informally suggested, field researchers may face even more constraints with regard to choice of appropriate, and acceptable, data collection methods.

### ***Evidential properties***

Organizational researchers often have to consider how their findings will be used, and by whom, before making methods choices, so that their approach will be perceived by relevant audiences as having been appropriate. Researchers thus have to take into account the potentially conflicting interests and expectations of their academic, managerial, and research participant audiences. Academic colleagues expect new knowledge and theoretical insight. Organization managers anticipate practical recommendations. Research participants typically wish to know that their contributions have been interpreted

and used in an appropriate manner, and are presented anonymously. The process, which leads from problem definition, to data collection and evidence, conclusions, prescription, and subsequent changes in organization practice, may appear to be linear, but is problematic. The relationships between evidence and practice in most fields (including medicine, where 'evidence-based medicine' is now mandatory) are complex (Fitzgerald et al., 2002), and the external validity of organizational research remains contentious. Qualitative researchers often have a limited interest in statistical generalization, emphasizing instead analytical (link to theory) and naturalistic (link to experience) generalization. Findings generated in one setting (acute medical care) may not generalize to others (bespoke furniture manufacture). Researchers must judge the scope conditions for their findings, or derive *moderatum* generalizations, indicating that aspects of a situation or context can be viewed as 'instances of a broader recognizable set of features' (Williams, 2000, p.215). Feeding back 'acceptable' findings in the context of a professional organization (Mintzberg, 1979b; Brock, Powell, and Hinings, 1999), such as healthcare, presents challenges not commonly faced by researchers in commercial settings. Doctors and engineers, for example, schooled in the norms of biomedical and natural science research practice, are understandably suspicious about research findings based on methods that do not appear to follow those familiar protocols. Evidence thus has to meet a receptive audience, whose members have adequate organizational authority, for findings to transfer into practice. That combination of factors is rare. It may even be the case that the researcher has to offer to conduct an enquiry specifically in a manner that gatekeepers regard as credible; for example, to secure access to a General Motors factory, Milkman (1997) agreed to conduct a survey that would provide 'hard quantitative data', even though her research required a qualitative approach.

Research evidence rarely reveals clear causal links. For all but the most closely bounded topics, the field is multivariate

and multilayered. For example, does total quality management improve organizational effectiveness? The main terms in this question are difficult to define with precision, they mean different things in different contexts, and to different stakeholders, and the number of interacting factors involved, over time, at various levels of analysis (individual, team, business unit, organization, and external context) defies simplistic attempts at theorizing (Iles and Sutherland, 2001; Øvretveit and Gustafson, 2002). Establishing cause and effect across complex, iterative, and multidimensional processes over time is challenging. Several commentators have turned to process theories to handle such phenomena (Pettigrew, 1985; Langley, 1999; Van de Ven and Poole, 2002; Dawson, 2003). Process theories tend to adopt a narrative form, and focus on local causality, rather than seek to identify universal laws linking dependent and independent variables. A further complication is that different stakeholders hold contrasting views of the nature, definition, and significance of organizational problems. However, audiences for research findings are often interested mainly in, 'what works?'. Researchers who can answer this question may find that their enterprise shares some of the attributes of the work of management consultants, but without the financial rewards. The respective roles of researchers and consultants are more closely intertwined than is often acknowledged. Researchers interested in, for example, total quality management, or business process re-engineering, can argue that they are studying novel organizational forms, but they are also studying the nature and implications of the commercial products of management consulting firms. The findings from such studies may be used both by host organizations and consulting firms, to influence organizational change processes.

Decisions about method may thus have to consider the nature of the evidence ultimately required to inform practice, and also assess the acceptability of different forms and sources of evidence to specific audiences responsible for implementing recommendations

(see Learmonth, Chapter 6, this volume for a critical discussion of evidence-based management).

### ***Personal properties***

Researchers commonly study topics in which they have a personal interest, using methods in which they are trained and competent, and with which they feel comfortable. Some researchers enjoy in-depth face-to-face encounters and the challenge of identifying pattern and order in qualitative data; others find satisfaction discovering at a computer screen associations in quantitative data sets. A researcher's training and skills can thus influence both choice of research topic and how it is investigated. Novice researchers are typically instructed not to allow personal preference and bias to intrude on 'technical' decisions concerning research methods. Should researchers be encouraged to experience guilt with respect to personal beliefs and passions, with respect to the skills that they have acquired, practised and honed? As many commentators have advocated, reflexivity should be encouraged in making and in reporting decisions concerning research methods.

Departing from the convention that relationships with research participants contaminate data, Dutton and Dukerich (2006) argue that the researcher's social networks and interpersonal skills ('relational practices') are critical to designing and sustaining interesting organizational research. While the contribution of friends and acquaintances with regard to accessing organizations as research sites and gathering relevant 'inside' information may be widely appreciated, these issues are rarely recognized in published accounts as factors influencing research design (Buchanan, Boddy and McCalman, 1988; Dutton and Dukerich, 2006, p. 21).

### ***Package deals and the unseen: implications for method***

This chapter began with the argument that the field of organizational research displays

at least three significant trends. The first concerns a widening of the scope of the agenda, embracing a growing range of themes, issues, problems, and settings. A second theme, common across the social sciences, concerns an eclectic, multiparadigmatic approach, which has contributed to a weakening of the traditional dominance (but not necessarily the influence) of positivist orientations. While blurred at the margins, those competing orientations have generated intense debate. Consequently, the field is fragmented, with little or no consensus around concepts, frameworks, theories, or practical propositions. A third trend concerns the creative approach to method, which now deploys a diverse array of data collection methods, with more novel techniques standing alongside, and often complementing established approaches. We then sought to demonstrate that choice of research methods is shaped not only by technical and theoretical considerations related to the research topic, objectives, and norms of practice, but also by a number of other characteristics of organizational field research:

Attributes of the organizational research setting or context

The research tradition or history relevant to a particular study

The inevitable politicization of the organizational researcher's role

Constraints imposed by a growing concern with research ethics

Theoretical and audience-related issues in translating evidence into practice

Personal preferences and biases with regard to choice of method

While these attributes of organizational research have been widely acknowledged, they are typically represented as problems or difficulties, interfering with choice of methods, to be avoided through careful planning. However, as Figure 1.1 seeks to illustrate, those factors, taken together, instead constitute an interrelated system of inevitable influences on research methods

choices. Contextualizing methods choice in this web of influence has at least three implications. First, it is difficult to sustain a model of the researcher as neutral observer. Even the selection of an underpinning paradigm is a politically inspired act, not merely an intellectually informed choice, as this can involve an implicit alignment with particular stakeholder interests, overlooking or marginalizing issues that may be more important to others. Neutrality is often further compromised in feeding back to gatekeepers reports of research findings, conclusions, and practical recommendations, as 'politically incorrect' conclusions may be omitted. Researchers claiming neutral status are often pursuing agendas that are implicitly aligned with partisan interests. The concept of researcher as detached and disinterested has already been widely discredited (e.g., Van de Ven and Poole, 2002).

Second, it is difficult to sustain a model of the research process in which method relies solely on links to objectives, the advantages and limitations of one approach weighed objectively against others. We have sought to show that methods choice is a multicriteria decision, involving a more complex, interrelated, and iterative series of considerations. Method in this perspective is part of a 'package deal', an integral component of a comprehensive research system where, in the pursuit of particular aims in a given setting, theoretical, epistemological, organizational, historical, political, ethical, evidential, and personal factors are combined in a coherent manner. Choice of method is not a 'stand alone' decision reached at an early stage in the research process, but evolves as a project unfolds, as the researcher's understanding of the issues, and also of the organizational research setting, develops. The widely-espoused view, reinforced in methods texts and elsewhere, that the research process (sampling, data collection methods, analysis, etc) flows logically and inexorably from research questions, is an oversimplification when this range of influences on an investigation is considered (Bryman and

Bell, 2007). It is not surprising that, when Grunow (1995) conducted a content analysis of organization studies articles, he found that only 21 percent discussed the relationship between the research topic or problem and the methods employed in the investigation.

Third, it is difficult to sustain a concept of method as neutral technique for bringing reality into focus. Shaped by a comprehensive web of influences, decisions concerning method frame the data windows through which organizational phenomena are observed. Methods choices determine the unseen as well as the documented, thus linking organizational, historical, political, ethical, evidential, and personal factors with the development of both theoretical and practical conclusions. Consequently, those factors can be considered as data, rather than as features of the research setting of problematic concern. Advocates of reflexivity (Woolgar, 1988; Alvesson and Skoldberg, 2000) advise openness and honesty with regard to the position and identity of the researcher, accompanied by critical self-appraisal. The argument here suggests that reflexive appraisal should be extended to incorporate discussion of the sweep of factors influencing methods choices for a given project, as these in turn both influence and contribute to the evidence base on which conclusions are constructed.

It is thus important to understand more fully, and to articulate more openly, the basis of research methods choices. The factors affecting those choices could perhaps be more widely reported to support methods training by providing a widely informed overview of the nature of the craft and to promote productive dialogue across a research community that seems to be increasingly fragmented by differences in orientation. Despite the web of constraints and influences, the design of organizational research work and the choice of data collection methods remain in part a creative process. This complex package of issues can be combined and configured in a variety of different ways. It is important, therefore, to recognize not only the technical skills and knowledge of

the researcher, but also the role of personal interests, preferences, biases, prejudices, and creativity.

Competence in research method has traditionally, and narrowly, been expressed in terms of selecting methods consistent with research topic and objectives, while avoiding or resolving those annoying practical field-work problems. We conclude that competence in method must now also encompass the ability to address, systematically and coherently, the organizational, historical, political, ethical, evidential, and personal influences identified in this chapter.

## NOTES

\*An earlier version of this chapter was first published in *Organizational Research Methods*; see Buchanan and Bryman (2007)

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