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Handbook of Qualitative Organizational Research Innovative Pathways and Methods

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Ups and Downs

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Ups and Downs

Trends in the Development and Reception of Qualitative Methods

Michael Mauskopf and Paul Hirsch

The trajectory of qualitative methods in social and organizational research features moments of high praise, strong attacks, benign neglect, and unexpected revivals. In this chapter, we analyze this turbulent history by charting shifts in the way qualitative scholars have framed their research and interpreted and presented their findings. Focusing on the ways in which qualitative research and methods have been framed, deployed, and legitimated suggests a sequential but rarely linear history that reflects different ontologies, perspectives, and agendas over time. These differences exist not only between qualitative research and other forms of social inquiry but within qualitative research itself, playing a critical role in shaping how qualitative researchers frame and defend their identities today.

The chapters in this handbook document how researchers conducting qualitative research in organization and management have succeeded in making the work more rigorous and relevant to 21st-century scholarship. Indeed, the social sciences have experienced a “qualitative revolution” in recent years, producing more high-quality and innovative research than ever before (Denzin & Lincoln, 2003). Within the field of organization and management, the quality and diversity of qualitative research is outstanding, receiving disproportionate accolades from our top journals (Rynes-Weller & Bartunek, this volume; Bansal & Corley, 2011) and inspiring new peer-reviewed publications featuring qualitative research (Cassell & Symon, 2006). While its traditional definitions often invoke phrases like “case-based,” “process-oriented,” and “thick description” and emphasize the interpretive and inductive rather than the statistical relationship between some set of variables, the developments in qualitative research discussed in this handbook suggest a blurring of lines that makes a simple definition hard to pin down. To be sure, “qualitative methods are many, they are everywhere, and they do not easily boil down to formula” (Van Mannen, 1998: *x*). While much qualitative research remains interpretive in some fundamental way, the development of Qualitative Comparative Analysis (QCA) and other set-analytic methods indicates some reorientations around scientific inference and causal claims (Goertz & Mahoney, 2012). While we will ultimately conclude that the state of the field may still retain its “let a thousand flowers bloom” characterization, much qualitative research produced today is more deductive in flavor, often emphasizing generalizable claims rather than case-specific insights. Is this simply the logical evolution of a more systematic approach to qualitative research, or the result of qualitative researchers adopting the norms of some real or perceived quantitative

mainstream? Advanced research designs, standardized analysis techniques, and new technologies have led some to celebrated gains in scientific rigor, while others decry the loss of contextual richness.

In this essay, we provide a historical context through which to understand the origins and implications of these developments. We focus on variation within the field of qualitative organizational research over time, highlighting distinct value systems (e.g., positivist vs. constructivist), preferred data collection and analysis methods (e.g., ethnographies vs. interviews, inductive description vs. deductive coding), and modes of presentation (e.g., narrative vs. tables). While these dualities represent an obvious but necessary simplification of questions facing qualitative researchers, we argue that they reflect fundamental elements in the norms of qualitative research practice and influence the relative position of qualitative research in organization and management studies more broadly. We conclude by discussing the implications of the increased diversity of qualitative methods on contemporary research practice and their potential costs and benefits for the future.

Mapping the Terrain

The designation “qualitative research” encompasses a diversity of methods, including historical analysis based on archival records, analysis of spoken or written texts, interviews that may be more or less structured, and observations of people and their surroundings (Van Mannen, 1998). When applied to the study of organizations, its reach is especially broad, in part due to management’s position at the intersection of multiple disciplines, including sociology, psychology, economics, political science, anthropology, and history. The boundaries of what constitutes normative qualitative organizational research are historically contingent. Although there is some consistency concerning what is and is not qualitative research over time, there is also meaningful divergence across historical periods. While most work in this vein focuses on the specific nature of individual cases rather than on generalizations drawn from some statistically significant sample, whether a researcher employed a particular method or assumption is considerably less determined.

Dominant paradigms and practices in qualitative organizational research emerged and evolved over time. Here we review five time periods during which the typical qualitative research conducted shared similarities that differ from research conducted in the others. These periods—pre-1950, 1950–1970, 1970–1985, 1985–2000, 2000–present—were selected jointly through our reading of works on the history of qualitative research and a consideration of punctuating events generally considered to have shaped the evolution of organizational theories and research.¹ Each period reflects a prevailing system of values and norms that are at least partially distinct; what exactly qualitative research “means” is contingent on the period and category in question. We then trace shifts in the content of five categories (i.e., method of data collection, method of data analysis, focus of interpretation, method of data presentation, relative position in organizational research) across each time period. These categories loosely imitate the research design-and-execution scheme used by most qualitative methods textbooks, and they roughly follow this handbook’s basic organizing principles. Table 3.1 summarizes the historical shifts of qualitative research across these categories. The clean edges and apparent simplicity of this table reflect the reductionist nature of this summary chapter. Indeed, the explanation that follows does not presume to be complete or systematic, but instead focuses on evocative and consequential shifts in qualitative methodology that helped to shape—and continues to shape—the future of organizational research.

Pre-1950

In the first half of the 20th century, nearly all behavioral research that occurred outside of the lab was qualitative in nature. Indeed, most scholars in the fields of sociology, anthropology, and political science at the time might be subsumed under the rubric of “qualitative researcher,” championing a

Table 3.1 Trends in Qualitative Organizational Research

<i>Period</i>	<i>Period Method of Data Collection</i>	<i>Method of Data Analysis</i>	<i>Focus of Interpretation</i>	<i>Method of Data Presentation</i>	<i>Relative Position in Organizational Research</i>
pre-1950	Case studies, ethnography, interviews	Intuition and description	Face validity	Narrative	Dominant
1950–1970	Case studies, ethnography, interviews, archival	Inductive manual coding	Internal and external validity	Narrative	One of several prominent streams
1970–1985	Single and comparative case studies	Inductive manual coding	Internal and external validity, reflexivity	Narrative	Increasingly marginalized
1985–2000	Single and comparative case studies, ethnography	Inductive and deductive coding (by hand or computer); QCA	Internal and external validity, reflexivity, generalizability	Narrative, coding manuals, tables	Gradual return to (minority) mainstream
2000–2014	Single and comparative case studies, ethnography, digital and mixed methods	Multiple-stage computer coding, text and discourse analysis, QCA, and other set analyses	Validity, generalizability, replicability, causation	Narrative, coding manuals, tables, process diagrams, decision trees, network maps	Fragmented but influential; ever-increasing quantity and diversity

brand of research focused on observing and describing the lives of “others” via ethnographies and interviews (e.g., Park, Burgess, & McKenzie, 1925). Rooted in intuitive discovery, their research efforts aimed to unearth and describe the world around them rather than to draw generalizable conclusions. The boundary between those doing the investigating and those being investigated remained fixed, and findings were organized and presented using relatively easy-to-understand language and a story-telling narrative comparable to the good writing in contemporary issues of *The New Yorker* or *The New York Times Magazine*. Subsequently, a common critique leveled against this type of qualitative research was that “it’s nothing more than journalism.” Organizational sociology and related disciplines continue to devalue journalism and vice versa. Hirsch (1999) later noted that journalists and social scientists still have a great deal to learn from one another, even as “too academic” remains a pejorative term among journalists, while academics often “mystify” their work through the use of jargon and other devices of obfuscation veiled as markers of scientific rigor.²

1950–1970

After World War II, qualitative research in the social sciences took on a decidedly modernist flavor, favoring a more theory- and method-oriented approach. Influential qualitative scholars active in organizational research during this period (e.g., Becker, 1961) began to explicitly distance their research from the work of journalists, who they argued did not engage with social theory, collect appropriate amounts of evidence, or incorporate systematic data analysis to generate defensible

conclusions (Ragin, 1994). Unlike their predecessors, this generation of qualitative researchers engaged critically with their observations, cultivating an implicit dialogue between empirical evidence and analytical frames informed by existing theory (e.g., Dalton, 1959). With the founding of *Administrative Science Quarterly* in 1958 and an increased interest in the influence of the environment on organizational outcomes, qualitative researchers began to develop systematic coding schemes to analyze their data. These schemes were developed inductively at first, helping scholars address issues of internal or concept validity without abandoning their interest in generating theoretical insights through the description of empirical phenomena. These developments were accompanied or surpassed by gains in other methods of organizational inquiry, including quantitative and action research. While qualitative methods remained a significant means by which to study organizational behavior, their singular foothold on the field was quickly being eroded by advancements in other areas.

1970–1985

After several decades in which qualitative research methods were well represented in studies of management and organizations, the 1970s and early 1980s saw a decline in their relative popularity. This trend can be attributed to several factors. First, the development and funding of sophisticated quantitative methods and computer software for statistical analysis generated renewed interest in cutting-edge quantitative methods. When asked in 1983 why qualitative research was appearing less frequently and seemed to be on the defensive, James Coleman, a pioneer in quantitative studies who also supported qualitative research, replied: “The rise of the National Science Foundation and the funding it provides.”³ In addition, the rise of critical theory and its emphasis on historical, cultural, and political contingencies led to a blurring of the distinctions between humanistic scholarship and social science. Many of original assumptions associated with qualitative research were challenged by a more critical stance following postmodern critiques of objectivity (Marshall & Rossman, 1999). For example, rather than being viewed as neutral observers seeking to understand others’ behavior, ethnographers increasingly engaged in a dialectical and reflexive relationship with those that they studied. This critical stance was exacerbated by the assumptions and values supported by the linguistic, cultural, and historical turns in social science, each of which enriched qualitative research by providing it with a post-modernist foundation but also marginalized it from other more positivist strains of organizational research. Despite their similarities, some have argued that qualitative and quantitative research comprise two distinct cultures that vary in their methodological orientations and research properties (Goertz & Mahoney, 2012; Miles & Huberman, 1994; Ragin, 1994). Work within the qualitative realm continued to be concerned primarily with small-N, within-case analyses that employed a logic of necessary and sufficient conditions, rather than statistical inference. While much of the research in this tradition has traditionally been driven by phenomenological concerns and been guided by the principles of analytic induction, description, and temporal sensitivity, it also signaled the increasingly fragmented nature of qualitative research itself (Van Mannen, 1983). Such internal diversity affected the identity and reception of this work as a coherent body of scholarship.

1985–2000

In the last decades of the 20th century, qualitative research experienced a revival. A growing interest in producing generalizable insights was enhanced with the appearance of new methods and reporting conventions. Although single ethnographic and historical case studies continued to serve an important function in qualitative research, multicase comparisons became a more common way to draw defensible conclusions about organizational processes and outcomes that reached beyond the

limits of an individual empirical context (see Dyer & Wilkins, 1991, and Eisenhardt, 1991 on the merits of single vs. comparative case studies). Qualitative scholars began to explicitly state theoretical propositions in their papers, which were increasingly generated through a process that was at last partially deductive. Nevertheless, translating qualitative findings into generalizable processes still remained a tricky and potentially misguided exercise, given the inherent differences between logical and statistical inference (Small, 2009).

The shift toward theoretical deduction and empirical generalizability was strongly reinforced by advancements in analysis techniques and technologies made possible by the personal computer. The appearance of new and more rigorous methods was aided by the development QCA (Ragin, 1987) and computer-based software that enabled automated coding (Dohan & Sanchez-Jankowski, 1998). These advances were instituted into standardized research practice through authoritative and widely distributed texts such as Miles and Huberman's *Qualitative Data Analysis*, now in its third edition. They built a bridge between qualitative and quantitative research traditions, aiding the effort to introduce more and different kinds of qualitative research in the field's top journals (Lofland et al., 2006; Van Mannen, 1998). Lessons from feminist, queer, and gender studies; linguistics; and a host of other perspectives also began to appear in the work of organizational researchers, highlighting the role qualitative methods could play in building new theory.

2000–2014

As with (almost) anything, empirical research can be understood as a competitive marketplace, and our collective concern over issues of reflexivity, reliability, and generalizability can be viewed in part as a consequence of our struggle to stay relevant—even central—to mainstream social science. Over the last 15 years, this has led to (a) an increased diversity of legitimate qualitative methods (Hannah, 2012) and (b) a mutually understood (if not agreed upon) standard of rigor that is applied to most, if not all, modes of qualitative research. An informal review conducted by the then-editors of the *Academy of Management Journal* found that “there is increasing consistency in the structure of published qualitative papers. . . . STATA analyses increasingly rely on coding data, findings are illustrated in increasingly detailed tables, graphs, and diagrams . . . [and] propositions are increasingly used to show a theoretical contribution” (Bansal & Corley, 2011: 234). Their assessment suggests that while our field supports more and different kinds of qualitative research than ever before, there is a greater expectation of theoretical engagement and methodological rigor and transparency.

The continued advancements made possible by computer-aided technologies and cross-field conversations have yielded additional innovations. More so today than ever before, mixed methods—qualitative, quantitative, or some combination of both—are used to conduct sophisticated, multipronged analyses of emergent or complex phenomena (e.g., Kaplan, this volume; Weber, Heiner, & DeSoucey, 2008). New and diverse forms of data and data analysis have resulted in new norms of data (re)presentation (Phillips, this volume). For example, although “big data” is often associated with sweeping quantitative analyses and sophisticated modeling techniques, its fine-grained nature enables qualitative researchers to generate rich, contextual explanations of social phenomena. Although narrative still serves as a primary means through which qualitative data is introduced, researchers often employ tables, process diagrams, and decision trees to make sense of their data and generate more causal claims (Goertz & Mahoney, 2012; Small, 2013). To control for researcher bias, contemporary scholars employ multistage coding techniques that systematically differentiate informant-generated codes and researcher-created concepts (Gioia, Corley, & Hamilton, 2013). These and other advancements may not have been possible in the past, but they are nonetheless historically contingent, suggesting that the innovations contained within this handbook will serve as a guide to future directions in qualitative organizational research.

Future Directions: What's Past Is Prologue

Qualitative research makes for more than just interesting reading; primed for empirical discovery and theory building, it helps us understand the world in new ways. Work in this domain is also increasingly rigorous and of generally high quality—while only 11% of the articles published in *AMJ* between 2000 and 2010 were based solely on qualitative data, they were the winners of six of its last eight best article awards (Bansal & Corley, 2011). The innovations charted herein have helped to move our field forward, even though qualitative research remains underrepresented in our flagship journals.

The blurring of these lines, and the lack of a unified qualitative paradigm (at least methodologically speaking), may be seen as a double-edged sword (cf. Sauder, this volume). Within-category fragmentation has made it difficult for traditional qualitative methods to gain a majority stake in organizational research. Yet, for the goal of advancing our understanding of the social world through rigorous and reproducible modes of inquiry, the evolution of qualitative research methods suggests continued growth and promise. In July of 2003, a group of the country's most accomplished social scientists gathered in Arlington, Virginia, to discuss what constitutes good qualitative research and determine how scholars might improve upon existing methods to advance scientific discourse and public policy. The conveners and participants of the National Science Foundation–sponsored workshop came to the conclusion that, while the state of qualitative research was more vibrant than it had ever been, room for further development remained (Ragin, Nagel, & White, 2004). Embracing a diversity of methods that address concerns about reliability, standardization, and generalizability without losing sight of a shared commitment to description and discovery will ensure qualitative methods continue to flourish in organization and management research. If we agree that methods are powerful tools rather than ends unto themselves, and that no single study can address all possible questions or critics, the future of qualitative organizational research remains bright indeed.

Notes

- 1 Our periodization is also aided and loosely informed by Denzin and Lincoln (2003), who denote seven historical periods of qualitative research that demarcate its development.
- 2 Such inaccessibility is paradoxically reinforced through the publication and editing process: “professionally, it is less harmful to be told that one’s writing is unclear or filled with jargon than that it is accessible and (too) clean.” (Hirsch, 1999: 253).
- 3 Personal communication with Paul Hirsch.

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