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Constraints, Compromises and Choice: Comparing Three Qualitative Research Studies

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Keywords

qualitative research

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Constraints, Compromises and Choice: Comparing Three Qualitative Research Studies

by

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Abstract

Although a number of texts explore social research strategies and methods, most are limited to a basic discussion of such methods and their associated advantages and disadvantages. Few if any, evaluate and compare methods in the context of actual research experiences. This paper endeavours to bridge that gap by reporting the experiences of three researchers working on three separate qualitative studies. All three studies were concerned with investigating the social milieu within organizations. While the research questions were different in each case, all the researchers shared a common goal - to develop explanations for complex social phenomena manifest both internally and externally to each organization. The research strategies, methods and data analyses employed are assessed through the personal evaluations of the researchers. Thus, a singular opportunity is offered for other researchers to benefit from the practical insights and lessons learned. The collective experiences of all three researchers suggest that the contextual conditions and constraints of each study force certain compromises, but which importantly, do not compromise qualitative research studies.

Introduction

The phenomena under investigation in each of the three studies reported in this article was the social milieu of organizations. Although the research questions were different in each case, all the researchers shared a basic common goal - to develop explanations for complex social phenomena manifest both internally and externally to each organization. Nonetheless, the research strategy, methods and data analysis employed by each was distinctly different. For instance, in the case of study one, the researcher undertook an extended period of participant observation in combination with unstructured interviews within one organization. By contrast, researcher two conducted a more orthodox qualitative investigation of three organizations involving semi-structured interviews and document analysis. In further contradistinction, study three comprised six case studies involving multiple interviews which were analysed using NUD*IST computer software. A quantitative survey instrument was also utilised in order to provide a context for the qualitative data.

The article begins with a brief review of the literature associated with epistemology, research strategies and data collection techniques. This review synthesises some of the debates encompassing various methodologies in order to argue that there is more than one valid way to undertake qualitative research. Each of the researchers' experiences are then discussed and

evaluated, before the concluding section attempts to compare and reconcile differences between the three research strategies.

Literature Review

This review has two aims. First to review competing debates relevant to methodology and, second, to base the differing approaches described in this article in a common but disparate body of knowledge. The discussion is organised around three themes common to all the studies; these are epistemology, research strategy, and data gathering techniques. Some further literature relevant to each study is included in the three separate research accounts.

The Research Question

Interdisciplinary fields of study such as employment relations and management draw on a broad and eclectic set of epistemological assumptions. In the philosophy of science, epistemology has a technical meaning concerned with the theory of knowledge, although social scientists rarely conform to this meaning. The paradox is that the way that [social scientists] theorize does not necessarily conform to the way that philosophers of science say they should (Bulmer, [1977](#), p. 276). For example, Hughes, in his *Philosophy of Social Research* likens the relationship between philosophy and the social sciences to the Christian parable of the 'prodigal son' where the sons and daughters of philosophy (the social sciences) "reject their parentage and squander their inheritance, only to return when the outside world becomes hostile and unwelcoming" (Hughes, [1980](#), p. 1).

The relationship between employment relations, management research and the philosophy of science may also be likened to Hughes's parable. With the rise of powerful and accessible technology, complex multivariate calculations and data processing systems now available to researchers, ever more accurate correlations are possible. According to Godard ([1994](#), p. 4) these methods rely on empiricist assumptions and method that exclude and limit knowledge claims and concepts that are not empirically observable to be invalid. Further, he argues that theories that are under-determined or do not yield clear unequivocal and empirically testable hypothesis are inadequate (Godard, [1994](#), p. 4). Conversely, social science research has long recognised a need to explain social behavior using abstract analytical concepts. As Plowman ([1991](#)) argued "contemporary industrial relations has shown a preoccupation with developing and applying statistical techniques notwithstanding that two [elements] of pure science research are absent - the ability to control the environment and the ability to measure certain variables" (p.18).

To clarify these issues the researcher must look to the epistemological basis of the research methods used in order to understand the limitations and implications of each. This requires two important issues to be identified, a) the subject matter of the research and b) the research question(s). Once these issues have been clarified, the development of concepts and the use of theoretical propositions to operationalize and interpret research are then filtered through various epistemological lenses.

Research Strategies

The three studies reported in this article focused on research questions concerning human agency, strategy and choice. Initial propositions were developed from the literature and each researcher's experience. Explanations to the research questions were sought through the development of theory rather than the replication of previous studies (see Lincoln & Guba, 1985). This allowed for investigation into influences embedded in the social processes of work that conventionally tends to be hidden. Gummesson (1991) maintains that because human beings in business situations are unique, there is a considerable likelihood that existing theory will prove inadequate for new investigations. Consequently, the researchers adopted the recommendations of Glaser and Strauss (1967) who propose that categories and concepts should be developed that emerge from the data and research experience. Thus, categories developed from sources that are external to the research process are complemented by the reality being researched. Where new relationships emerge, this leads to a rethinking of the phenomena studied.

Data Gathering

The method of data gathering is not separate from the research strategy but intimately connected in several ways as Miles and Huberman point out:

From the beginning of data collection, the qualitative analyst is beginning to decide what things mean, noting regularities, patterns, explanations, possible configurations, causal flows and propositions. The competent researcher holds these conclusions lightly, maintaining openness and scepticism, but the conclusions are still there, inchoate and vague at first then increasingly explicit and grounded...(cited in Batelaan, 1993, p. 207).

Table One illustrates that although all the studies involved participant observation and document analysis, in each case they were utilised to differing degrees. Interviews were the primary research technique in each case, although study three included a quantitative survey as a secondary research method. These details are explained more fully in the three separate research accounts.

Table 1. The Research Method Used for Each Study.

Research Variables	Study 1	Study 2	Study 3
Number of case studies	Three	Three	Six
Quantitative survey	No	No	Yes
Participant observation	Yes (in-depth)	Limited non-participant observation	Yes (between interviews)

Document analysis	Yes	Yes	Yes
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Case studies offer the prospective researcher the ability to obtain rich data with high validity whilst situating and interpreting data within their wider context (holism). As such, case studies provided important research settings for all three researchers. Criticisms of case study reliability overlook the notion that the case study inferential mechanism relies upon 'the cogency of the theoretical reasoning' rather than the typicality or representativeness of the case (Mitchell, [1983](#)).

All three researchers also used document analysis as a means of supplementing other data. Scott (cited in May, [1994](#)) establishes criteria for evaluating the quality of the evidence available through an analysis of documentary sources. Briefly, the criteria include authenticity, credibility, representativeness and importantly the establishment of the meaning of the document and its contribution to the issues researchers are hoping to illuminate. Whatever the method utilised when multiple techniques are triangulated, as in the case of the three studies reported here, it is argued that the strength of research findings, validity and the possibility of generalization or extrapolation are increased (Bryman, [1989](#); Hammersley, [1996](#); Strauss & Whitfield, [1998](#)).

This section has briefly reviewed literature relevant to the methodologies described, particularly literature that is pertinent to the research of management and industrial relations issues. Each of the following three studies focuses on the research question posed, the research strategy involved, data gathering and analyzing before summarizing with an evaluation of the research process.

Study 1

The Research Question

The argument in this article is that similar phenomena can legitimately be researched in different ways. In other words, there is no *one best way* to undertake social science research. What is important is what defines the research methodology, and this requires thinking through several fundamental issues with an open mind.

It is frequently claimed that the research questions and theoretical propositions developed from relevant literature is the starting point in any such endeavour. Conversely, the aim of this project was to work from the general to the specific, continually refining and developing the theoretical propositions as more data was gathered. In short, the primary objective of the study was to investigate how unions develop and implement strategies to increase union power and membership.

The Research Strategy

The research strategy involved 'micro level' case studies of three divisions of the New South Wales Services Branch of the Australian Services Union (ASU). It was conducted over a 12-month period between December 1998 and December 1999. Several research techniques were

used including document analysis, ethnographic observation, detailed interviews and informal discussions with union officers and elected officials located in the three divisions.

The researcher aimed to look beyond the boundaries of the case studies to gather data and provide plausible explanations for the complex social relations that were observed. The researcher observed day-to-day industrial issues and the union's response to these, whilst considering the justifications and decision-making processes that occurred. This research strategy provided important insight into the behaviors, beliefs and practices of union officials. Relatively little is known about the day-to-day activities of union officials at the intermediate level, yet this level seems to be central to the interpretation and implementation of strategy.

Data Gathering and Analysis

Ethnographic data techniques were used for this study due to the nature of the phenomena under investigation. As many social processes involve covert beliefs and practices, observation and continual refinement of theoretical propositions is necessary in order to understand them. In other words, what we expect to find (based on our understanding of the phenomena from literature and the synthesis we undertake in our own minds) needs to be tested in the field. As we do this, our understanding deepens and we begin to see connections between what might be at first glance unconnected issues. The second benefit of ethnographic techniques is the development of relationships; particularly trust between the researcher and the researched that can occur through the research process. The behavior of unions and union officials is inherently political and personal. Through the building of relationships comes access to the more political and personal data granted to us as researchers by the respondent.

Two sequences of interviews were carried out. The first sequence was conducted with two aims in mind. Firstly, to gain an understanding of the practices and policies occurring in the union, and secondly, to become acquainted with the officials interviewed. These interviews were carried out in conjunction with documentary analysis of union records. The second and subsequent sequence of interviews gleaned much more insight and detail than the first, with the content being informed through the author's observations and informal discussions that occurred from time to time. The fundamental aim of these techniques was to avoid treating respondents as objects of study. By giving respondents a part in the total research process, it is argued that the quality is enhanced through continual criticism and discussion on themes and issues identified with those that are practicing what we are researching. Keeping in mind that the research objective sought to identify the internal social processes involved in developing strategy, and barriers to this development, it was deemed appropriate to undertake this type of data gathering.

Gradually, a picture began to emerge of the values and priorities that union officers bring to their work. The final argument was developed through the initial reading of the literature to the writing up and re-checking of the data. This last process involved a union official in the role of 'gatekeeper' who committed herself to reading drafts and giving feedback. This involved a continual process of refinement and learning for the researcher.

Evaluation of the Research Strategy: Constraints, Compromises and Choices

Ethnographic research techniques present several problems that need to be considered as part of the methodology. For example, ethnographic research relies heavily on appropriate levels of access, trust and commitment to the project between the researcher and the respondents. Thus, an important limitation is the trade-off between time spent in the field with a relatively small group of respondents, and the benefits of a wider research focus associated with other research techniques such as surveys. Another potential problem is the relational aspect of ethnographic research that can lead to the researcher becoming 'too close to the data'. This is mediated somewhat, however, through the use of multiple sources of data to help overcome the problem.

This section of the article has argued that the defining issues relevant to the selection of research design, methods, and data-gathering techniques are the research questions and objectives. For this study there was no hypothesis to be developed and then tested in the analysis. Rather the theoretical propositions termed as *what we might expect to find* were developed from the literature and general discussions. From here the specific form of the research was continually shaped through the totality of the research project, best explained in the early work of Glaser and Strauss (1967) as a 'grounded theory approach.'

Study Two

The Research Question

In study two, the researcher was concerned with examining contemporary trends to individualise employment relations within the Australian coal industry. Using an amended version of Brown's (1998) means of analyzing the extent of individualization in employment relations, the research proceeded to examine employer and state support for individualised employment relations and the concomitant response of trade unions.

The Research Strategy

The research strategy involved conducting a series of case studies in the coal mining industry. Three cases were selected for investigation. The selection process was informed by a range of sources from which an 'eligibility' list was established. These sources were as diverse as industry insiders/informants, personal knowledge and experience, the extant literature and news reports. The established eligibility list contained those organizations that were known within the industry to have policies and practices designed to individualise employment relations as well as those who seem to prefer to maintain collective employment relations. From this eligibility list, organizations were approached and permission sought to conduct interviews with key personnel.

After informed consent was granted by participating organizations, semi-structured interviews were conducted with key interviewees associated with each case. Interviewees were selected and approached on the basis of their assumed knowledge of the issues to be jointly explored and which further the aims of the thesis. Key interviewees included Trade union officials, Industrial Research Officers, Trade union delegates and organisers, Human Resource Managers/Employee Relations Advisers, Senior Managers and Employees.

Data Gathering and Analysis

Semi-structured interviews were chosen as the most appropriate data gathering technique. This is because the research strategy required information concerning interviewee's personal beliefs, considered opinions and insights. These are difficult to obtain through structured interviews where rigid questioning prevents opportunities to pursue an interesting angle or call for elaboration. The semi-structured interview technique builds into questioning, sufficient flexibility to capture insights that may otherwise be lost to the imposition of the 'next' structured question.

The interviews were conducted in accordance with Schein's (1983) 'iterative clinical interview' technique that involves a series of joint explorations between the researcher and the interviewee. Schein's basic rationale for using such an approach is that ". . . only a joint effort between an insider and an outsider can decipher the essential assumptions and their patterns of interrelationships" (1983, p. 112). By conversing with the interviewee, the researcher can correct his/her misinterpretations. In practice, internal validity checks were conducted during the interviews by using a question such as, "so what your saying is...Is this a correct interpretation?" were used. Secondly, this interview method is useful in overcoming internal invisibility. Schein (1983) argues that interviewees cannot tell the researcher about the basic assumptions or how they are patterned because they have ceased to be aware of them. Therefore the researcher is required to help bring to the level of consciousness, the basic assumptions that interviewees hold about their organization.

The interview schedule was established around a number of key themes, informed by the literature. Briefly, these themes centred on the use of individual contracts, the incidence and application of HRM practices, the impact of changes to 'freedom of association' provisions and an explanation of contemporary events and phenomena in the Australian coal industry. As May (1997, p. 111) suggests, this thematic structure allows "... for people to answer more on their own terms than the standardised interview permits, but still provide a greater structure for comparability over that of the focused interview".

The interviews were recorded and notes were taken. Relevant interview data was collected, coded and analysed and potential 'regularities, patterns and explanations' were flagged and placed into relevant categories that were conceptually linked to the thematic guides. The documentary sources relied upon for study two included, corporate documents, trade union minutes, letters, enterprise agreements and transcripts from industrial tribunals courts and various parliaments. As critical primary and secondary sources these documents served to reinforce or contradict data obtained through the semi-structured interviews. The criteria proposed by Scott (cited in May, 1994) in the data gathering section of this article offers a structured and logical approach to the consideration of documentary sources and provided a framework for evaluating the documentary sources used in study two.

Evaluation of the Research Strategy: Constraints, Compromises and Choices

Whilst the research strategy was theoretically secure and academically defensible, the researcher's expectations in study two were not met at all levels. For example, the researcher expected that all insights would come from interviews and documentary analysis. However, some of the most interesting insights were revealed from simple non-participant observation

despite this not being an acknowledged data collection technique. For instance, when the researcher conducted interviews with one particular union official, the interview had to be held outside the union's offices since these had been closed to prevent the service of Supreme Court orders.

On another occasion at a Greenfield mine site, the common staff entrance, geographical location of buildings and pervasive motivational posters of Australian sport stars reinforced the view imbued in interview data, that management was attempting to build a single status workforce. Finally, a framed newspaper article that was critical of a senior member of the Australian arbitration tribunal was spotted in the office of a general manager of a mining company, reinforcing evidence of this company's intolerance of third parties in the employment relationship. These experiences underscore the importance of the researcher keeping both 'ears and eyes' open and this interviewer's own regret that more 'non-participant observation' could not have been undertaken. The controversial and somewhat sensitive nature of the issues to be researched, however, acted as a significant constraint on more extensive observation.

An additional compromise of the research strategy was concerned with the number and selection of cases to be studied. The small number of cases selected facilitated an in-depth and more nuanced analysis of the pertinent issues but also limited claims of the 'representativeness' of the findings. However, the choice of cases was clearly more important than the number of cases as the researcher was concerned with comparing atypical as opposed to typical cases.

Despite the constraints of a small number of cases, the rather orthodox research strategy employed in study two generated rich data and the use of the internal validity check, provided some comfort that the researcher's own interpretation matched that of the interviewee. Inevitably though, human experience cannot, and should not, be suspended in attempting to describe and explain complex social phenomena. After all, meaning and truth in social science are actively and ultimately constructed from research interactions infused with external, worldly material.

Study Three

The Research Question

The main research question to be answered by study three was: what is the influence of management style and organizational culture on skill utilization (particularly 'soft skill' utilization). A principal assumption of this study was that, in essence, all employees possess some degree of soft skills. That is, they are able to communicate at some level and have some interpersonal skills and problem solving ability, but it is how they are manifest within the workplace that is influenced by management style and the corporate culture. What managers do, or do not know about their management style and its effect on corporate culture and employees' soft skill utilization is important for managerial, employee and organizational effectiveness. Extant literature states that although soft skills are important contributors to workplace efficiency (Ashley, [1993](#); Bassi, [1999](#); Hearn, Smith, & Southey, [1996](#); Marginson, [1993](#); Mayer, [1992](#); Moy, [1999](#)) they are deficient in many employees and managers (Green & Connell, [1995](#); Green, Machin, & Wilkinson, [1998](#); Karpin, [1995](#); Moss & Tilly, [1996](#)).

The Research Strategy

As the aim of the research was theory building, rather than theory testing and verification (see Lincoln & Guba, [1985](#)), the researcher drew on grounded theory methodology, and to assist this process, research methods were triangulated. The primary research method comprised qualitative case studies utilizing interviews, researcher observation and document analysis. The secondary method was a survey questionnaire designed to build a profile of each organization's culture. In total, six different firms were investigated (which included 70 interviews with a total of 101 interviewees) at every level of each firm. 192 questionnaires were distributed and 145 were returned. Despite the subsidiary role of the survey in relation to the qualitative research, it served to provide broad, quantifiable background data in which to contextualize the case studies.

Data Gathering and Analysis

Pidgeon and Henwood ([1996](#)) comment that when researchers break out of a priori theorizing they may find they have large amounts of unstructured data to contend with. In this case the utilization of NUD*IST software greatly reduced the time consuming aspects of the manual 'cut-and-file' processes generally involved in qualitative data analysis. Apart from data management, NUD*IST is also designed to assist users who want to shape their understanding of the data as it helps the formation and testing of theories through iterative procedures (Gahan & Hannibal, [1998](#)). This occurs through a process of 'system closure' that enables the results of enquiry to be put back into the system as more data to enquire about (QSR NUD*IST, to enquire about (QSR NUD*IST, [1997](#)).

One of the most important aspects of theory generation is the full documentation of the analytical process. This serves as a prompt for further analysis and is an important part of forcing the tacit, implicit or subliminal to the surface of awareness (Turner, [1981](#)). The documentation of data results in the generation of an "array of concepts, categories and theoretical observations, which provide the building blocks for subsequent theorizing" (Pidgeon & Henwood, [1996](#), p. 87). This procedure begins with the development of an open ended indexing system referred to as 'coding'. Coding (or the labelling of phenomena) is the mechanism of analyzing data and includes the breaking it down, examining, conceptualizing and categorizing of data. Ultimately Pidgeon and Henwood ([1996](#)) maintain that success in generating theory that is well grounded in data depends upon maintaining a balance between the full use of the researcher's own subjective understandings, and concept matching.

To analyse the quantitative data a series of parametric and non-parametric tests were performed. In addition, descriptive statistics provided a further source of analysis and helped to identify the prevalence of emerging trends, when compared with the qualitative data.

Evaluating the Research Strategy: Constraints, Compromises and Choices

Underlying the main research question was the intention of discovering whether there are certain conditions where an organization's culture and/or management style serves to encourage or discourage soft skill utilization. The purpose of the qualitative research was to investigate the relationships and behavioral issues inherent in the main research question. The quantitative data

in isolation would not have provided the means to address these issues, but was useful in that it supported the broader findings of the qualitative data. This was beneficial in determining just how widespread particular effects were, and which category of respondent was most affected. For example, the claim that the small company respondents were more positive than the large company respondents was well supported in the quantitative data. The qualitative data provided the *rationale* for their positivity, and its effect on individual and organization performance, while the quantitative data illustrated the patterns that substantiated this information.

As the researcher chose to undertake six case studies, this, in itself was a constraint as clearly it is not possible to become as familiar with six organisations as it would be for a smaller number. Nonetheless, comparisons between various factors and organisational size became increasingly important in the study.

Whipp (1998) argues that the limitations of qualitative research depend partly on the standpoint of the researcher, as the constraints could just as easily be viewed as the inherent strengths of the method. For example, a purely quantitative study would not have captured the social processes evident in the relationships between management style, organisational culture and soft skill utilisation. In this case, however, ultimately a compromise occurred when it became evident early on in the study that not all of the quantitative data were going to 'match' the qualitative data. In some instances, this was explained by phenomena occurring in the qualitative data, but in others it appeared to be a consequence of utilizing mixed methodologies, whereby slightly 'messy' results occurred. As Patton (1990) suggests attempts to converge the data do not necessarily lead to a well-integrated whole and are not as 'neat' as using just one method (p. 465). This may explain why, as Parkhe (1993) argues, relatively few management researchers utilise qualitative research, and even less resort to joint research such as the combination of qualitative and quantitative approaches.

Comparing the Three Research Methods and Lessons Learned

The research experiences described in this article suggest that there is no one best way to research social phenomena. Clearly, each methodological approach had its own strengths and weaknesses, nuances and peculiarities, and all can be altered, refined and merged with other methods to meet the specific demands of the research question and the local context within which the research object exists. The research questions in each case were distinctly different, although, enough similarities existed between the research phenomena under investigation to enable comparison.

Table 2: The Constraints, Compromises and Evaluations of the Three Studies Compared.

Constraints, compromises and evaluation.	Study One	Study Two	Study Three
Constraints	Ethnographic research	Three case studies	Six case studies did

	involved a significant investment by the investigator that provided answers to the 'how' and 'why' questions but could not answer questions of reliability and frequency.	allowed for in-depth analysis of atypical cases but limited representativeness.	not allow for a great deal of depth but did allow for breadth.
Compromises	In-depth participant observation generated rich data but limited the research focus to a small number of respondents.	Sensitivity of issues to be researched meant that observation was limited so that access would not be jeopardised.	When qualitative data was compared with the quantitative data, some quantitative results were unexplained.
Evaluation	Generated rich data to 'how' and 'why' questions.	Generated rich data but more non-participant observation would have offered an additional means to confirm findings.	A large amount of data was produced. Overall the quantitative findings assisted in supporting the qualitative findings.

The constraints and compromises involved in each study are summarised in table two. Specifically, all three studies employed non-participant observation to varying degrees. In study one for example, this approach was central to the research strategy but in studies two and three it was simply something to 'keep in mind' in between interviews. This was identified as a weakness in study two where the researcher expressed regret for not having consciously undertaken more non-participant observation. However, the sensitivity of the issues involved meant that the researcher chose to compromise the research strategy by limiting data gathering techniques to semi-structured interviews and document analysis. This compromise, however, did not jeopardise the research process. Conversely, the study one researcher acknowledged that in-depth participant observation involved a significant trade-off between investing large amounts of time with a relatively small group of respondents and the possibility of gaining a wider research focus had more cases studies been undertaken.

The number and choice of cases is a key question to be resolved by qualitative researchers. In study three for instance, six cases allowed the researcher to gain a broad overview of the issues, but precluded a more detailed examination of these same issues in contrast to studies one and two. Clearly, in study three, questions of reliability and frequency were more important to the research objectives than in studies one and two.

The constraints and compromises summarised in table two reinforce the notion that compromise of some sort is common to all research strategies. Inevitably, researchers are faced with not only

the demands of the research question, but also other local limitations and contextual conditions which sometimes force a re-appraisal of the method, without compromising the research process or findings.

The collective experience of all three researchers suggests that, although clearly influential, the choice of research methodology is rarely completely conditional upon the research question or epistemological assumptions. The researcher's choice of methodology is inevitably shaped by limitations and research considerations that go beyond epistemological and research question issues and which ultimately result in compromise.

Conclusion

The aim of this article was to provide a practical addition to the research methodology literature by comparing three researchers experiences and the lessons they learned from undertaking qualitative research. Although all three researchers primarily used qualitative techniques, each utilised triangulated methods customizing the three different approaches according to their research questions and objectives.

Ultimately, as Patton (1990) pointed out, the validity and reliability of qualitative data depends to a great extent on the methodological skill, sensitivity, and integrity of the researcher. As the authors of this article found, the generation of useful and credible qualitative findings occurs through observation and interviewing. This requires significant discipline, knowledge, training, practice, creativity and hard work. Despite this, the rewards gained from qualitative enquiry were reaped in the 'information-richness' of the data, thus ensuring the continued commitment to qualitative research.

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