Editorial to the conference issue

Books on research methods are an important resource for all business researchers. As new methods develop, we as researchers need to have up to date information on how and why to apply these methods. As existing methods are applied in ever more unusual situations, the limits and power of methods becomes ever clearer. A book on the subject is an effective way to learn about these developments in the detail required for a serious researcher. However the range and numbers of new books that are published each year leaves us all with hard choices of selection. Hence the journal is starting a new section on book reviews, which we hope will aid researchers in this choice. The first review is included in this issue.

The conference papers

The subject of research methods in business is showing an extra-ordinary level of activity and innovation and this conference (the 12th European Conference on Research Methods in Business and Management) reflected this. These papers dealt with the problems facing management researchers in a variety of ways. Many Papers offer help in applying new approaches such as Narrative methods.

The final selection of papers was made by the editor of the Journal, who is grateful for the help provided by the guest reviewers. The papers selected were chosen for their quality of writing, their relevance to the Journal’s objective of publishing papers that offer new insights or practical help in the application of research methods in business research.

The chosen Papers

The first paper (Cameron, Dwyer, Richardson, Ahmed and Sukumaran) offers an intriguing lesson in self evaluation. It offers an excellent example of how to apply mixed methods to a practical case but the core of the paper is the systematic application of a framework (GRAMMS) to evaluate the quality of the work carried out so far.

The next two papers deal with a method that has a long history in other disciplines but is a relative newcomer to business research – narrative method. One (McMullen Cathi and Ian Braithwaite) gives an excellent introduction to the method illustrating by application to a case. The second paper (Eaves and Walton) deals with a more complex situation and makes the case for the value of the narrative method in such situations. The paper introduces a structured method for applying the method -
STRIKE - *STructured Interpretation of the Knowledge Environment*. It presents a case example and compares the findings from STRIKE favourably with those found with focus groups. This is a paper for more experienced researchers who wish to consider using the narrative method.

The paper by Lionel Tractenberg introduces an unusual topic – a method for developing a meta synthesis of many studies when the research method adopted for these studies is qualitative. This is a well worked over area for positivist quantitative research work but there is much less guidance available on how to combine the results of interpretivist research carried out a specific problem/subject. The last paper addresses an issue of great importance to the individual researcher –the value of keeping a personal research journal (David Lamb).

**Book Review**
Lessons from the field: Applying the Good Reporting of A Mixed Methods Study (GRAMMS) framework

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Abstract: The aim of this paper is to apply a quality framework for mixed methods studies referred to as the Good Reporting of A Mixed Methods Study (GRAMMS) framework which was developed by O’Cathain, Murphy & Nicholl (2008). Mixed methods research is an emerging methodological movement and one which is gaining in popularity across business and management fields. Those who have studied the use of mixed methods research in business have noted that a common criticism of mixed methods studies reported in academic journals is the lack of a justification or rationale for the use of mixed methods and how the study has integrated the data or findings from the study. The aim of this paper is to apply and therefore demonstrate what needs to be documented when reporting a mixed methods study. To do this we have applied the GRAMMS to a piece of field research already reported to a community based audience. The study utilised an exploratory mixed methods research design over three sequential phases and involved a combination of both qualitative and quantitative data combinations throughout the three phases. The research and its findings are now being prepared for academic publication through the process of applying the GRAMMS framework. We have documented this process as a means of assisting novice mixed methodologists who may be struggling with how they might report this new and emergent approach to research. The GRAMMS framework consists of six main points which address the rationale for utilising mixed methods as well as issues relating to the methodological choices attached to data collection methods, sequencing, sampling, priority of data, points of integration and data analysis techniques. The value of the paper lies firmly in the documenting of the GRAMMS application process and therefore how to best write up community based mixed methods field research for an academic outlet and audience.

Keywords: mixed methods research, GRAMMS, extended mixed methods notation system, data transformation, skilled migrants

1. Introduction

This paper applies the Good Reporting of A Mixed Methods Study (GRAMMS) framework developed by O’Cathain, Murphy and Nicholl (2008) to a field study which has been recently completed in regional Australia. The study was community based and guided by a Community Advisory Committee (CAC) made up of representatives from the community. The CAC members represented regional employers, government departments and, community groups and as such, enabled us to claim this as an exemplar of community engaged research. The study investigated the contributions made by skilled migrants and their families to Australian society and in particular to the economic and social sustainability of Australia’s regions. A key finding from the study was the fact there is no one national data collection mechanism which records the location and economic activities of skilled migrants once they enter an Australian port. This lack of data meant the research team and the CAC needed to employ innovative ways in which to build empirical data that would contribute to pieces of the larger picture and to thereby attempt to answer the research questions posited.

The study was conducted by a multidisciplinary research team in conjunction with the CAC over a nine month period resulting in a report which was published for a community audience. The report was written specifically with this audience in mind and does not contain the level of methodological reporting required for academic publication. The report is being used by various community groups in the region as evidence of regional cultural diversity and how this diversity is contributing to regional sustainability, community cohesion and cultural inclusivity. The research team now wishes to publish the research and its findings in academic outlets.

To this end more sophisticated analysis and data integration will need to be undertaken. The process of applying the GRAMMS guides the research team in a process of reflexivity to enable the team to plan this next stage of reporting for academic publication.

A common criticism of mixed methods research (MMR) is the lack of explicit documentation and transparency of the reporting of mixed methods studies. The GRAMMS was developed for this very reason as a result of the study undertaken by O’Cathain, Murphy & Nicholl (2008) on health services research. In addition to the GRAMMS framework we have also applied Haneef’s (2013) flow of empirical research products and content and Sandelowski and Barroso’s (2003) typology of qualitative findings to assist us position the study. We also utilise the Extended MMR Notation System developed by Cameron (2012) and Newman et al’s (2003) Typology of Research Purposes to aid us in this reflexive and transformative process.

We present an overview of the study in terms of the study’s research design, aims, objectives and research questions which is followed by a discussion of Haneef’s (2013) flow of empirical research products and content and Sandelowski and Barroso’s (2003) typology of qualitative findings, to position the current state of the analysis of the study’s findings within the research process and it’s products. This will be followed by the application of the GRAMMS framework to the study as a process of reflexivity for preparing the study’s data (qualitative, quantitative and integrated) for academic publication.

2. The mixed methods study: Case study of skilled migrants in regional Australia

The study in its abbreviated form was titled A case study of skilled migrants in regional Australia and was conducted in the Gladstone local government area situated in central Queensland. The region is surrounded by resource rich basins which feed the Queensland resource sector with coal and coal seam gas/liquefied natural gas (CSG/LNG). Gladstone has a history of heavy industrial development, along with a large commodities harbour and port. People are attracted to the region because of the employment opportunities this industrial environment offers, along with the natural beauty of the surrounding waterways including the Great Barrier Reef.

2.1 Aim and purpose of the study

The overall aim of this study was to investigate the contributions of skilled migrants and their families to regional business and communities and to identify the factors which attract and retain skilled migrants in key workforces in regional areas. The research questions posited for the study were as follows:

- **RQ1:** What economic, social and cultural contributions do skilled migrants and their families make to regional business and communities?
- **RQ2:** What are the issues encountered by business and communities when employing skilled migrants?
- **RQ3:** What support does business and the community need to provide to ensure they attract and retain skilled migrants and their families in regional areas?
- **RQ4:** What support do skilled migrants and their families need to better assist them settle, become active members of communities and remain in regions?
- **RQ5:** What are the implications of the study findings for policy and practice?

2.2 Research design

A sequential exploratory mixed methods design utilising both qualitative and quantitative data collection methods across three sequential research phases was employed for the study and was conducted over a nine month period. A sequential exploratory design utilises the first method (qualitative) to assist develop and inform the second method (quantitative) (Greene, 2007). This design is best suited to exploring a phenomenon
(Plano Clark & Creswell, 2008) and is useful when the researchers need to develop an instrument because one is not available (Creswell, 2009). Creswell and Plano Clark (2007) describe this design as follows:

*In this design, the researcher first qualitatively explores the research topic with a few participants. The qualitative findings then guide the development of items and scales for a quantitative survey instrument. In the second data collection stage, the researcher implements and validates the instrument quantitatively. In this design the qualitative and quantitative are connected through the development of the instrument items. Researchers using this variant often emphasize the quantitative aspect of the study (Creswell & Plano Clark, 2007:77).*

Our study deviated somewhat from this description in two ways. Firstly, there was three phases in the research with two quantitative instruments developed (Professional Workforce Survey and the Community Migrant Survey). The Professional Workforce survey was disseminated at the end of the first phase and the second survey (Community Migrant Survey) was distributed at the end of the third phase.

Phase 1 of the research involved a scan of Health Services in the region (QUAL), semi-structured interviews with Human Resource managers (QUAL) and the development and distribution of a Professional Workforce Survey (quan). Phase 2 involved the collection and analysis of an array of secondary data sets (QUAN) and a series of five case studies (QUAL) of small to medium sized enterprises that had used skilled migration. The third Phase involved interviews (QUAL) with community leaders and members of various ethnic communities (Indian, South African, Filipino and Jamaican) within the Gladstone region followed by the development and distribution of a Community Migrant Survey (QUAN). Figure 1 provides a visual depiction of the overall research design which has been adapted slightly from that presented in the community report (Cameron et al., 2012).

Phase 1: QUAL + quan
- **Primary data:**
  - Health services scan
  - HR Manager semi-structured interviews (n=7)
  - Professional Workforce Survey (n=26)

Phase 2: QUAN + QUAL
- **Secondary data sets:**
  - Census & DIAC Settlement data
  - GRC-citizenship
  - GAPDL-RSMS
  - DETE-public schools
- **Primary data:**
  - SME Case Studies (n=5)

Phase 3: QUAL + QUAN
- **Primary data:**
  - Semi-structured interviews with community leaders and migrant groups (n=8)
  - Community Migrant Survey (n=73)

Source: Adapted from Cameron et al., (2012:37)

**Figure 1:** Summary of research design and phases

To a large degree the research was emergent and the difficulties faced in achieving access to data meant that decisions were made during the first and second phases to gain access to other data sources not planned at the initial stages. As a means to supplement the relatively failed attempt to obtain a statistically significant number of professional Workforce Surveys, the research team, in consultation with the CAC, opted for a series of case studies in Phase 2 and the development of a Community Migrant Survey in Phase 3.
2.3 Research team and community advisory committee

The research team was made up of academics from a regional university across three regional campuses and from three different discipline areas: human resource management, nursing and midwifery and tourism. The research team worked very closely with the Community Advisory Committee (CAC) who met regularly with the research team to advise, guide and provide access to secondary and primary data sources. As a result the study was an exemplar of community engaged research. Due to the composition of the CAC and the community engaged research approach taken, it was important the first research product from the research be targeted to the intended community based audience hence the publication of a report for the community (Cameron et al., 2012). The following section of the paper introduces two conceptual frameworks which assist the authors position the study for future data transformation and academic publication.

3. Research processes and products

This section of the paper introduces two conceptual frameworks: Haneef’s (2013) flow of empirical research products and content and Sandelowski and Barroso’s (2003) typology of qualitative findings) to assist us position the current status of the study within the boarder ‘progressive development of research work products and report content’ (Haneef, 2013:388). Haneef (2013) examined empirical research consolidation techniques for the purpose of presenting a generic overview or classification scheme of these techniques. As part of this process Haneef (2013) has broken down the elements of a research report. The resulting framework has been applied here to assist the authors in the process of data transformation required for academic publication of the identified community based study. Haneef (2013) refers to the breakdown of research report elements (depicted in Figure 2), as a simplified and notional version of empirical research. Empirical content includes the data collected and the findings which have been developed from it. The pre-empirical content includes ‘material developed prior to data collection, such as theoretical frameworks, motivation, research questions, context, and methods. Post-Empirical Content includes material that is based on the findings as well as the experience from the research activity, such as generated theory, implications, discussion, and recommendations’ (Haneef, 2013:388). In Figure 2 below we have added the concept of Sandelowski and Barroso’s (2003) continuum of data transformation to provide a more comprehensive framework for the positioning of our study in the process being reported here. This second conceptual framework has also been helpful in assisting us to position the current study.

![Flow of empirical research work products and report content](https://example.com/fig2.png)

Source: Adapted from and Haneef (2013) and Sandelowski and Barroso (2003)

**Figure 2:** Flow of empirical research work products and report content

The typology of qualitative findings developed by Sandelowski and Barroso’s (2003) and depicted in Figure 3 adds another dimension to the positioning of our research study despite the fact this framework relates to qualitative research and the study we have conducted is mixed methods. Sandelowski and Barroso (2003) developed this typology to explain the differences between qualitative findings in health research, ‘What our typology does do is place findings on a continuum indicating degree of transformation of data, from findings that remain very close to data as given (e.g., a summary of informational contents from a manifest content
analysis of data) to findings representing many transformative moves away from data (e.g., a phenomenology of self-transcendence)’ (Sandelowski and Barroso (2003:907-8). Figure 3 illustrates the categories in the typology on a continuum indicating their interpretive distance from data. A reference to the continuum of data transformation from this typology is mentioned in Figure 2.

Sandelowski and Barroso (2003) see a key feature of the typology as being:

...its emphasis not on what authors named their analytic and interpretive methods but rather on the contents and form of what they presented as the findings in their reports of the studies they conducted...A focus on the findings themselves reveals the kind of analytic and interpretive work actually performed, no matter what the research rhetoric.... Such factors as the presence, amount, and absence of verbal text, metaphoric language, quotes, numbers (e.g., frequencies, means, percentages), tables, figures, and other textual and visual displays revealed more about the methodological orientation of a study than any statements of method in the method sections of reports (Sandelowski and Barroso, 2003:909).

![Figure 3: Continuum of qualitative findings](source: Sandelowski and Barroso (2003:908).

**Figure 3**: Continuum of qualitative findings

The Sandelowski and Barroso (2003) typology/continuum assists us in positioning our study at its current state of data interpretation, or more specifically at the point directly following the production of a research product aimed at a particular community based audience. The degree of data transformation of the data reported in the community report for our study is much lower on the continuum of data transformation described by Sandelowski and Barroso (2003) than is anticipated for future academic publication. The process of applying the GRAMMS framework will assist us to progress the data analysis along this continuum.

We have positioned the published report from the study (Cameron et al., 2012) as the community based constituent audience research product from the study. It is important to indicate the intended audience when reporting research whether these be, practitioners, policy makers, funding agencies, community groups, general public, specific research communities or academic researchers. The Cameron et al., (2012) report is a research product intended for a particular audience with certain levels of data analysis and transformation best suited to the consumption and use of that particular audience. The typology allows us to position this report on the continuum at the exploratory stage with the aim of progressing the data transformation to the descriptive stage of the continuum.

Both Haneef’s (2013) flow of empirical research products and content and Sandelowski and Barroso’s (2003) typology are useful tools for researcher reflexivity. They enable researchers to step back from their research and begin to view and place the progress of the research along a continuum whereby they can begin to judge...
the level of data transformation they have achieved and/or plan to achieve, ultimately with the view to publication. Both frameworks can assist researchers and research teams engaged in large long term projects but can also be very useful for those individual researchers undertaking doctoral research or individual studies can assist candidates and researchers benchmark their progress and set goals for future timeframes.

Sandelowski and Barroso’s (2003) primary purpose for developing their framework was to assist researchers in being competent readers of research reports. ‘A competent reader of qualitative research will understand the report as an after-the-fact reconstruction of a study and, therefore, be able to read reports for what they represent about what was likely done as opposed to what was claimed or intended. Our typology is primarily in the service of achieving that competence’ (Sandelowski & Barroso, 2003:919). It is argued here that competent readers also become competent writers. The practice of critiquing and assessing research products can greatly improve a researchers own writing and therefore the quality of their own research products.

4. GRAMMS framework

The O’Cathain, Murphy and Nicholl (2008) study analysed 75 health services research reports through a quantitative documentary analysis of Department of Health funded research in England between 1994 and 2004. The aim of their study was to assess the quality of these mixed methods studies. The study found that the main quality issue was a ‘lack of transparency of the mixed methods aspects of the studies and the individual components. The qualitative components were more likely to be poorly described than the quantitative ones’ (O’Cathain, Murphy & Nicholl 2008:96-97). In terms of attempts to integrate the qualitative and quantitative data there were few if any attempts to do so as there was a ‘tendency for researchers to keep the qualitative and quantitative components separate rather than attempt to integrate data or findings in reports or publications’ (O’Cathain, Murphy & Nicholl 2008:97).

The study sought to examine the quality of the mixed methods studies in terms of describing and justifying the use of mixed methods, the use of mixed methods research designs, levels of transparency around the qualitative components of the studies and levels of integration of data and findings. The GRAMMS framework mirrors these concerns. Some of the questions generated by the study to assess the quality of the reported mixed methods studies included: Is the use of MMR justified and the MMR design described? Is the role of each data collection component clear and described in sufficient detail? Are these methods congruent with the research questions posed? Have issues of rigour and validity been addressed? What type of integration has been stated and is this appropriate to the design? Is there clarity about which findings have emerged from which methods and are the inferences appropriate? (O’Cathain, Murphy & Nicholl 2008).

As a result of the research and analysis the study produced the Good Reporting of A Mixed Methods Study (GRAMMS) framework to encourage quality reporting of mixed methods studies. This six-item framework includes prompts about the ‘success of the study, the mixed methods design, the individual qualitative and quantitative components, the integration between methods and the inferences drawn from completed studies’ (O’Cathain et al., 2008:92). The GRAMMS includes the following set of quality guidelines:

1. Describe the justification for using a mixed methods approach to the research question
2. Describe the design in terms of the purpose, priority and sequence of methods
3. Describe each method in terms of sampling, data collection and analysis
4. Describe where integration has occurred, how it has occurred and who has participated in it
5. Describe any limitation of one method associated with the presence of the other method
6. Describe any insights gained from mixing or integrating methods
The paper now begins a process of reflexivity by applying the GRAMMS as a means to position the next stage of the data analysis and integration of our own study. Each of the six steps of the GRAMMs will be systematically applied to the study and will generate recommendations to enable the future submission of research products (journal submissions) for academic audiences.

5. The reflexive process: GRAMMS

The following section of the paper reflexively addresses each of the six key prompts from the GRAMMS framework.

5.1 Describe the justification for using a mixed methods approach to the research question.

Researchers demonstrate and prove validity when they ‘can show the consistency among the research purposes, the questions, and the methods they use’ (Newman, Ridenour, Newman & DeMarco 2003:167). There needs to be methodological logic between the key aspects of the research. The justification of the use of a mixed methods research design was not fully explained or explored in the original research report to the community, suffice to say that it was used to address a complex problem:

Mixed methods ‘are used when the phenomena being studied is considered complex and beyond the reach of a single method’ (Morse & Niehaus 2009, p.15). Mixed methods research provides opportunities for presenting a greater diversity of divergent views and can provide stronger inferences (Teddlie & Tashakkori 2003, p. 15)’ (Cameron et al., 2012:36).

It is recommended that the next iteration of the reporting of our study and its findings will contain a full justification for using the overall mixed methods research design and will also explicitly address each data collection method within each Phase. Each of the five research questions will be discussed in terms of how the data could be most effectively and appropriately integrated to answer the questions. This discussion will draw upon: the lack of national, state or regional data collection mechanisms, the complex nature of the phenomenon being investigated, the lack of a substantial research base to draw from (as identified in the review of literature), the difficulties gaining access to data sources in industries experiencing high pressures related to world commodity prices, mergers and acquisitions and re- structuring and limited resources and timeframes.

5.2 Describe the design in terms of the purpose, priority and sequence of methods

In the report published for the community from our study the purpose was not made as explicit as it could have been. For future academic publication this will need to be addressed by drawing upon the literature within the MMR community which refers to purposes for utilising mixed methods research. To this end the typology of research purposes developed by Newman et al’s (2003:175) will be applied. This typology contains nine main research purposes:

- Predict
- Add to the knowledge base.
- Have a personal, social, institutional, and/or organisational impact.
- Understand complex phenomena.
- Test new ideas.
- Generate new ideas.
- Inform constituencies.
Examine the past.

Our research, as it was reported to in late 2012, had a key purpose of informing constituents of the wider community. Newman et al., (2003) have provided more specific sub-purposes under each of these nine main research purposes. For the main category of “inform constituencies”, a further seven more specific purposes are listed as follows:

Inform constituencies.
- Inform the public.
- Heighten awareness.
- Public relations.
- Enlighten.
- Hear from those who are affected by treatment/program.
- Describe the present.
- Comply with authority.


Of these, all with the exception of the last (Comply with authority) were directly related to the purpose and intention of our research. Other research purposes that will be tabled in future reporting of the research will include “Add to the knowledge base”, “Understanding a complex phenomenon” and “Measure change-measure the consequences of practice”. These purposes will be prioritised and discussed in much greater detail. We will also draw from the purpose for utilising MMR developed by Greene, Caracelli and Graham (1989): Triangulation; complementarity; development; initiation and; expansion.

The priority and sequence of the methods across all the phases of the study was influenced greatly by the timeframe, funding and contextual issues (access to data sources) and to a large extent the choices made were emergent. The priority and sequence of methods was described and documented in the methodology section of the community report with a figure similar to that of Figure 1 in this paper (see Figure 6 in Cameron et al., 2012: 37), however greater detail will need to be included in future submissions for academic audiences.

It is recommended that to address this item from the GRAMMS, Newman et al’s (2003) typology of research purposes and Greene, Caracelli and Graham’s (1989) purposes for utilising MMR will be employed in a discussion of purposes for using a MMR design followed by an in depth discussion mapping the methodological choices made for the use of mixed methods across the three phases and corresponding explanations for the multiple data collection processes and instruments that were employed. The use of the jigsaw puzzle metaphor will be utilised in this discussion to assist with meaning making. Metaphors are literary devices used to describe qualitative (Richardson, 1994) and mixed methods research (Bazeley & Kemp, 2012).

5.3 Describe each method in terms of sampling, data collection and analysis

One of the best ways to describe the sampling, data collection and analysis in a mixed methods study is to utilise the newly developed Extended MMR Notation System developed by Cameron (2012), especially when the study is phased and as complex as the one being reported. Cameron (2012) developed this system by expanding on the existing and established mixed methods notation system which has evolved and been commonly adopted by the MMR community when reporting MMR studies (see Creswell and Plano Clark, 2007). The Extended MMR Notation System summarises the discussion and description that needs to be detailed in the body of the reporting (data sources/samples, sample sizes, data collection instruments and the analysis undertaken for each data collection method). The Extended Mixed Methods Notation System notates data samples as either primary or secondary (DS:Primary or DS:Secondary), identifies sample sizes [S-SIZE:
and whether data collection instruments and data analysis techniques are either qualitative or quantitative (INST:ql or ANSIS:QT). An example of this is presented in Figure 4 which depicts the Extended Notation System for Mixed Methods Research applied to Phase 1 of the research.

![Figure 4: Applying the extended mixed methods notation system to Phase 1](image)

**Phase 1: QUAL + quan**
- Health Services Scan
- HR Manager Interviews
- Professional Workforce Survey

**Phase 2:**
- QUAN + QUAL

**Phase 3:**
- QUAL + QUAN

**Health Service Scan**
- DS: Primary(1)
- S-SIZE: (n=150)
- INST: QL
- ANSIS: QL → QT

**Interviews**
- DS: Primary(2)
- S-SIZE: (n=7)
- INST: QL
- ANSIS: QL-1

**Survey**
- DS: Primary(3)
- S-SIZE: (n=26)
- INST: qt
- ANSIS: qt-1

The Extended Mixed Methods Notation System will also be applied to Phases 2 and 3.

5.4 Describe where integration has occurred, how it has occurred and who has participated in it

Data integration was not reported in the community report which was written and presented to the community in late 2012 (as per the project timelines). It contained basic sets of descriptive data and analysis. For some data collection methods the samples were too small to be of statistical significance and so planned analysis could not be undertaken. More sophisticated data analysis is now occurring in preparation for academic publication. The writing of this paper is part of that data transformation process and will be influential in determining what data integration will be analysed and reported. The use of the Extended Notation System for Mixed Methods research mentioned above will assist in this process as the system notates data sources (primary and secondary), sample sizes, data collection instruments and data analysis techniques for each data collection method. This will be particularly useful when documenting data integration where various configurations of data integration is described and presented to address the research questions posed. It is recommended that for each research question data integration will be presented. An example of how this will be configured is presented below in relation to RQ1:
RQ1: What economic, social and cultural contributions do skilled migrants and their families make to regional business and communities?

<table>
<thead>
<tr>
<th>RQ1</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic contributions</td>
<td>Phase 1: Health Services Scan (QUAN), Interviews with HR Managers (QUAL), Aspects of Professional Workers Survey (e.g., occupations and educational qualifications) (QUAN)</td>
</tr>
<tr>
<td></td>
<td>Phase 2: Population capital data from secondary data sources (QUAN), Case studies of SMEs (QUAL)</td>
</tr>
<tr>
<td></td>
<td>Phase 3: Interviews with community leaders (QUAL)</td>
</tr>
<tr>
<td>Social Contributions</td>
<td>Phase 1: Aspects of Professional Workers Survey (e.g., joining of community groups and volunteering) (QUAN)</td>
</tr>
<tr>
<td></td>
<td>Phase 3: Interviews with community leaders and representatives from ethnic groups (QUAL), Aspects of Community Migrant Survey (QUAN)</td>
</tr>
<tr>
<td>Cultural Contributions</td>
<td>Phase 1: Aspects of Professional Workers Survey (QUAN)</td>
</tr>
<tr>
<td></td>
<td>Phase 2: Data from secondary data sources that demonstrate levels of cultural diversity within the region (QUAN)</td>
</tr>
<tr>
<td></td>
<td>Phase 3: Interviews with community leaders and representatives from ethnic groups (QUAL), Aspects of Community Migrant Survey (QUAN)</td>
</tr>
</tbody>
</table>

5.5 Describe any limitation of one method associated with the presence of the other method

In the original report written for a community audience limitations were addressed in terms of the limitations of the secondary data collected in Phase 2 of the study. The discussion on the limitations of the study will need to be more comprehensive for reporting the study to academic audiences and will flow on from the application of the Extended Mixed Methods Notation System to be applied when addressing item 3 of the GRAMMS.

It is recommended that the limitations of using the methods chosen with the presence of the other methods will be addressed in reporting this research to academic audiences through a discussion of the limitations of each data collection method, within each of the three phases of the research and, across the three research phases. Given the exploratory nature of the study and the three phase structure, the metaphor of a jigsaw puzzle and jigsaw puzzle pieces will be employed to create and transfer greater meaning in this discussion.

5.6 Describe any insights gained from mixing or integrating methods

The mixing of methods was necessitated by the data void the research team uncovered in attempting to obtain reliable empirical evidence as to the presence and numbers of skilled migrants and their families in a regional area in Australia. This in itself was a significant finding. Much greater insights and an array of perspectives were gained from the use of a three phased MMR design as could not have been obtained from single (monomethod) or even multi method research designs. These methodological approaches would not have been able to address the data void or collect an array of perspectives (multiple data sources) or obtain the richness of data required to address the research questions posited. The combination of both secondary (QUAN) and primary data (QUAN and QUAL) collected from a variety of data sources within the community enabled the study to put together some of the pieces of the puzzle to what is a complex phenomenon. As a
result, snippets of data, from across a range of data sources within the community were collected given the limitations in respect to resources and timeframes.

It is recommended that the study address these insights comprehensively both in the methodology and findings/discussion section of any future reporting of the study for academic audiences. This needs to be done honestly and with a high level of transparency and objectivity.

6. Conclusion

The purpose of this paper was to apply the Good Reporting of A Mixed Methods Study (GRAMMS) framework to a mixed methods research study so as to progress the study to academic publication from its humble first public appearance as a report for community consumption. The paper has outlined this applied undertaking and the frameworks and tools which have assisted in this reflexive and transformative process. What has resulted is a reflexive process guided by the GRAMMS and the desire to share our lessons from the field, in the hope that such an exercise will inform and assist other researchers in their quest to transform and report mixed methods studies well.

The paper presented an overview of the study (research aims, objectives, research questions and research design) before introducing the first of six conceptual frameworks and tools to assist the authors in this reflexive and transformative process. The first was Haneef’s (2013) flow of empirical research products and content, followed by Sandelowski and Barroso’s (2003) typology of qualitative findings. These frameworks allowed us to position the current state of the analysis of the study’s findings within the research process and its products. This was followed by the application of the GRAMMS framework which allowed us to document a set of actions needed to prepare the study’s data (qualitative, quantitative and integrated) for academic publication (as opposed to the community based constituent audience the study has already been published for). In addition to these frameworks the Extended MMR Notation System developed by Cameron (2012), the Typology of Research Purposes (Newman et al., 2003) and the MMR purposes (Greene, Caracelli, & Graham, 1989) was added to assist us document key items under the GRAMMS.

The value of the paper is threefold. Firstly, the paper offers researchers a guided reflexive narrative and plan, informed by several frameworks and tools, for the transforming of community based MMR study for academic publication. Secondly, the paper’s explicit attention to the GRAMMS framework reinforces the need of those engaging in MMR to ensure they are reporting this research rigorously through explicitly documenting and arguing their respective methodological choices. Thirdly, the paper encourages the “competent reader” as outlined by Sandelowski and Barroso (2003), as well as, encouraging the competent MMR writer by offering an exemplar on how to address and counter the critiques commonly espoused in terms of mixed method research products.

References


Abstract: This paper foregrounds multi-layered and polyphonic narrative inquiry to elucidate an authentic representation of the intersectional sensemaking processes of organisational actors. This can afford particular value during the complex and dynamic circumstances of transformational change, as exemplified within the narrative tension of the joint venture Communications Sector Provider case examined in this study. The approach is panoptic and deeply situated within the context of understanding meaning-making. This is achieved by adopting a multiplicity of embedded, creative and integrative approaches to narrative elucidation, evaluation and articulation, supported by robust triangulation and process transparency. The original framework STRIKE - *Structured Interpretation of the Knowledge Environment* is demonstrated to afford particular value as a diagnostic and prescriptive observational tool, based on Wittgenstein’s (2001) picture theory of meaning. With notable attention to non-somatic artefacts, STRIKE surfaces actor sensemaking and emergent narratives in situ. In addition, creative art and visualisation techniques optimise the conduits for direct participant expression, augmenting the traditional focus group method to enhance the capacity for *all voices to be heard*. The collocation of narrative data within context benefits authenticity and advances the production of coherent and cohesive findings. A holistic, multi-dimensional, multi-textured and representational understanding of the problem situation emerges. This brings the criticality of human interaction with the physical as well as the social environment in order to create meaning to sharp focus. It is through an intersection of human-material, social-technical dialogue, across physical, textual, linguistic and visual dimensions, that organisational actors maintain, recreate and reinterpret their individual and collective identity as a means to navigate and make sense of, the complex self and group challenges catalysed by transformational change.

Keywords: narrative inquiry, authenticity, polyphony, sensemaking, transformational change, STRIKE

1. Introduction and aims

Within the qualitative paradigm and an emergent range of mixed methods studies, advancing recognition of the value of narrative inquiry is evidenced (Clandinin and Connelly 2000; Jackson 2011). As a broad definition this approach “captures personal and human dimensions of experience over time, and takes account of the relationship between individual experience and cultural context” (Etherington 2012). Researchers are navigating highly storied, ambiguous, dynamic and idiosyncratic contexts, exploring aspects such as emotion, time and imagery and need to capture the rich processes of social representation. There is a move “away from description” (Mello 2002, p232) to work with proximal and sometimes transactional representations of what the data shows. An increasing number of studies are described as narrative, but as a broad, nebulous term these vary significantly (Riessman 2008), notably with distinctions in the paradigmatic stance adopted and the emphasis placed on form or content (Spector-Mercel 2010).

Underpinned by classical pragmatism (Dewey 1988) alongside interactive constructivism (Neubert 2001), this study adopts an innovative, integrated, multi-layered approach to narrative inquiry, synthesising form, content and critical reflexivity. It aims to advance understanding of actor sensemaking during transformational change, finding new ways to surface and negotiate meanings and findings in narrative data, working across the complex nexus of reality and representation (Mello 2002). The intent is polyphonic: to enable voices to be heard and for meanings to be transparently elucidated and authentically preserved, thereby communicating...
the lived experience of the actor lifeworld (Habermas 1984). The criticality of human interaction with the physical as well as the social environment in order to create meaning is also asserted.

The paper commences with an expansive discussion of the nature of narrative inquiry. This is followed by an explication of the research methodology and introduction to the contextual setting. The case study of a newly formed joint venture communications service provider in the midst of transitional processes and practices presents a dynamic, underexplored source for narrative analysis. Method selection is then fully justified with particular attention to the original framework STRIKE – **STRuctured Interpretation of the Knowledge Environment**. An integrative evaluation of results is supported by the transparency of interpretation, assemblage and articulation of narrative data, with validity enhanced through robust triangulation. The paper concludes with a synthesising discussion of findings, review of methodological approach and implications to benefit research and practice.

2. **The Nature of Narrative Inquiry**

2.1 **Perceptions of truth**

Narrative is ubiquitous, natural, **familiar** and diverse in form (Barthes 1977), affording “**sequentiality**” (Bruner 1990, p43) and providing an organising framework of temporality. Interactional, evolutionary and transactional in orientation, narrative connects knowing and telling to enable the construction of shared understanding of spaces, actions and events, developing social knowledge and benefiting both individual and group sensemaking. Tropes, notably metaphors, are frequently employed to describe the lifeworld within narratives and “**imply a plausible understanding of phenomena**” (Green, Alpaslan and Mitroff 2010, p.48). It is argued that a robust examination of narratives can move beyond a primary consideration of structural and linguistic properties of verbal interactions and texts, to incorporate extended visual and physical place-based dimensions as an extension of the actor’s sense of self, as exemplified by artefact demonstration and associated symbolism. This assertion brings the need to explore **the truth** of narrative inquiry into sharp focus.

Despite Austen’s (2013, p3) popular assertion that truth must be “**universally acknowledged**”, difference and diversity of perspectives is considered more representative, aligning with a postmodernist position (Caputo 2013). The nature of truth may be considered from varying dimensions: a correspondence with the actuality of the world, the consensus of experienced viewpoints, coherence to an integrated belief system, and a pragmatic perspective embodying truth with practical utility. Narrative inquiry challenges modernist, traditional perspectives on truth and reality, the nature of knowledge, ways of knowing and the essence of self. Verisimilitude or the appearance of reality may be considered a criterion of a narrative way of knowing (Rorty 1979). Lived experience is emphasised as a catalyst for the social creation and construction of narrative knowledge through shared stories and their associated meanings (Bruner 1990). The knowledge gained through narrative inquiry is therefore “**situated, transient, partial and provisional; characterized by multiple voices, perspectives, truths and meanings**” (Etherington 2013).

This paper considers narrative from the perspective of both multi-dimensional means of elucidation and evaluation alongside the lived-through phenomenon of the actors, synthesising form and content. Aligning with a paradigm shift from realism towards constructivism and additionally, a postmodernist cultural shift (Huttunen, Heikkinen and Syrjälä 2002), this interpretative approach is considered germane to advance understanding of the intersection between culture, experience and change (Clandinin and Connelly 2000).

3. **Foregrounding Authenticity**

Authenticity is a nebulous, elusive term, primarily defined indirectly and negatively through its antonyms – thereby emphasising **what it is not** (Oxford Dictionaries 2010). Identifying direct descriptors from a
philosophical perspective, Sartre (1965, p90) considers authenticity as “having a true and lucid consciousness of the situation”, making the association with the correspondence theory of truth. It is further described as the coincidence of subject consciousness alongside its own objective reality (Sartre 2003). Authenticity has been explored in relation to sincerity, genuineness and honesty although there are specific distinctions as exemplified by differences in social, relational and personal/self-directional emphasis, alongside manner and content (Cambridge 2010). Indeed Golomb (1995) asserts that such comparisons are neither equivalent nor synonymous.

Applied to the research domain, authenticity is sometimes cited interchangeably with truth (Scott 2007) but is primarily discussed with respect to dimensions of reliability, validity and triangulation. These influence the approach and methodology adopted and assessments of quality, meaningfulness or worth, from the lens of both the researcher and the ultimate research audience (Bush 2012). As a multidimensional phenomenon, authenticity impacts across the entire research process: from researcher role, ethics and processes of critical reflection; to data collection, evaluation and representation. The authenticity of narrative research is specifically debated (Winter 2002; Holloway and Freshwater 2009). It is recognised that “Story-tellers acknowledge that they alter stories” (Tversky 2004, p389) and this potential for distortion and misinterpretation during verbal articulation is cited as high as 60% in one study (Tversky 2004).

This paper argues that authenticity may be addressed in consideration of the inherent relationships between the artefacts, people and places which underpin it (Jones 2010). This perspective is supported by the theoretical lens of social-materiality (Latour 2005; Johri 2011) which opines that social, technical, human and material dimensions are linked and re-linked, with meanings, properties and respective boundaries entangled, temporal and subject to constant reproduction (Pickering and Guzik 2008). An authentic representation of the actor narrative may therefore benefit from employing a creative range of integrated, multi-layered methods to surfacing, evaluating and presenting full narratives (Tversky 2004), across physical, textual, linguistic and visual dimensions, all embedded within place.

4. Types and Purposes of organisational narratives

4.1 Targeted and Emergent

Continually framed, styled and shaped in consideration of audience and purpose, an organisational narrative may afford intent to persuade to action, to re-tell, to bind, to educate and/or to inspire. This can develop and strengthen social capital through reaffirmation, creation or redirection, as reflected in Cohen and Prusak’s (2001) indicative taxonomy of stories which range from organisational myths, to hero, failure, war and stories of the future conceptualisations. Unique, temporal and closely aligned to identity, organisational narratives necessitate a level of congruence and controllability to communicate espoused values and core business activity and can also form a bridge across historical roots to future direction.

Organisational narratives may be identified under alternate names: the *spin* associated with public relations management (Lamme and Russell 2010); the *sagas* (Mahadevan 2009), *myths* (Cohen and Prusak 2001) and *legends* of corporate cultural history (Gabriel 2000), *folklore* and *folk-art* embedded in traditions (Bruner 2002) and the powerful *brand story* that binds community affiliation (Muniz and Schau 2005). Web 2.0 and Social Media conduits such as the Blogosphere and Twitterverse afford an increasingly active role in targeted narrative development to cultivate or establish brand identity or to achieve specific intervention aims using population segmentation. They also provide a catalyst for more emergent forms which may be public or employee driven (Millard et al. 2011).

The association between narrative and the construction or deconstruction of identity (Riessman 2008) can be profound and merits evaluation from an actor perspective, post significant organisational change. Along with social foundations, it is argued that narrative as identity may also be considered an inherently aesthetic
phenomenon: deeply felt, embodied and capable of being accessed and interpreted through different presentational forms (Bell and Bell 2012).

5. Narratives and transformational change

It is through narratives that actors bind themselves to one another (and their organisation) and further, recreate themselves. This can give meaning, enable sensemaking, and maintain the truth of self-conceptions of role and identity (Mahadevan 2009), especially during times of change or crisis (Bruner 2002). This can afford rich insight into the perceived human experience of change. Additionally, there exists a dynamic and inter-relation 

The knowledge intensive UK Communications industry therefore provides a germane contextual background for this study. This dynamic environment faces complex and interrelated challenges including evolving consumer behaviour, context-based services and convergence which impacts data architecture and markets across media, networks and associated devices (Orr 2013). This is therefore a knowledge intensive sector experiencing transition. Described as “the new core competency” (Ross 2009), joint venture agreements are increasingly utilised to provide financial, economic and operational synergies across supply chains.

Applying a multi-faceted narrative lens towards the joint-venture case affords a heuristic depth and breadth of inquiry into the sometimes congruent but often conflicting layers of individual, collective and organisational story. Buy-in to both the legitimacy of integration processes and the new organisational form is acknowledged as core to successful partnering outcomes (Gole and Morris 2007). Change occurs through people: their complex connections, relationships, stories, community memberships and collaborative actions. It is therefore critical to enhance understanding of the effect of transformation on the organisational actors required to accept, legitimise and actualise change, notably the means in which individuals internalise, rationalise or even resist the new narratives. This study addresses a lacuna of empirical research in this area.

6. Research methodology

Complex evaluations of real-world scenarios frequently necessitate robust consideration of situated actions and problems and a combination of different, flexible approaches to investigation. Alongside the problem situation itself, the methodological aspects of any research activity are dependent on the paradigmatic commitment allegiances of the researcher(s), with epistemological and ontological commitments defining the paradigm (Johnson and Duberley 2000). To develop nuanced contextual understanding, a qualitative approach is adopted, informed by classical pragmatism (Dewey 1988) alongside interactive constructivism (Neubert 2001). This affords full consideration of experience, habit and communications embedded in context and awareness of the researchers’ perspective as both self and distant-observers.

Narrative inquiry is selected as the most appropriate means to explore the experiential life-world of actors whilst affording researcher self-reflexivity. From an ontological perspective, a narrative inquiry considers organisational life as a storied reality. Epistemologically, knowledge is constructed within this reality and expressed through language conveyed in varying forms that can be difficult to elucidate. Additionally, data collection is informed by the emic perspective of the principal investigator as an insider-researcher. This enables enhanced acceptance and capacity to acquire understanding in praxis, alongside specific awareness of internal cultural dynamics. The interpretation of narrative meaning may be impacted by the researcher’s perspective alongside the storyteller’s (Mello 2002) and therefore may be influenced by insider-status. The risk is purposefully mitigated by the reflexive balance achieved through the non-insider, etic position of the co-author.
7. Research Setting and Introduction to Data Collection

The anonymised case study, referred to as Firm-JV, was formed as a 50:50% joint-venture between Communications Provider Firm A, an established market leader with a highly defined brand image and 20 years sectoral experience, and less established competitor Firm B. References made to previous organisational culture all relate to Firm A - the headquarter site under study being populated by its former employees. The alliance strategy centres on cost leadership through optimisation synergies, cost reduction and consolidation. It is internally openly described “as a move away from product innovation leadership and customer intimacy”, thereby a significant change in superordinate goal. A major restructuring and rebranding programme was launched in Q2 2012. Research was conducted in Q3 2012 using a panoptic range of direct and indirect methods.

7.1 STRIKE - STRuctured Interpretation of the knowledge environment

Underpinned by a socio-material lens (Latour 2005; Johri 2011) and aligning with the “visual turn” in narrative inquiry (Riessman 2008, p181), it is argued that systematic observation of the physical environment can illuminate organisational practices, cultural norms and values and further, be revelatory of the individual and collective narratives of the actors within. Whilst it must be recognised that knowledge can only reside in the consciousness of a sentient human being, the physical knowledge environment can and will involve non-somatic artefacts and additionally, be indicative of, and intersect with, the actor’s social environment.

STRIKE is a framework, which when instantiated, becomes of model of the domain under consideration. It considers these non-somatic, material artefacts from which both tacit and explicit individual and group narrative signifiers may be interpreted. STRIKE is based on Wittgenstein’s (2001) picture theory of meaning which has three levels. The pictorial level allows for a synthesis of all the elements as they are perceived by the actors in the environment. The representational level depicts the configuration of these elements to constitute legitimate knowledge in the context under consideration. Finally the logical level, the most abstract of all, would indicate which level of learning would be possible in these circumstances, revealing whether actors have wide options or are constrained to a narrow trajectory, and elucidating power dynamics in the lifeworld. It therefore can afford a highly integrative and multi-layered tool for narrative inquiry.

STRIKE advances the system analysis tool STROBE (Kendall and Kendall 1984) and has been subject to robust ex-ante and ex-post study validation, drawing on the Design Science Research Method (Heje, Baskerville and Venable 2012). Development was influenced by researcher concern that methodological reliance on individual and/or group participant story-telling may result in increased potential for misinterpretation due to accounts of distortion (Tversky 2004), groupthink, nostalgia (Gabriel 2000) or “Emotion contagion” (Goleman 2005, p104), impacting the authenticity of representation. Additionally, STRIKE’s neutral and unobtrusive nature can counteract against issues of power relations between researcher and researched (Clandinin and Connelly 2000). It is opined therefore, that STRIKE affords a path that can avoid attenuation of the data captured, so that as much of the characteristics of the system in focus as possible can be presented to the interpretive activity. The inter-relationships between actor and environment are preserved.

Office walk-through sessions were conducted to enact the STRIKE framework. Eight explicit environmental elements were appraised: office design, aesthetics, workspace decoration, supporting equipment, knowledge sources, clothing, branding and exterior presentation. Photography was used to provide an additional layer of understanding to the people-place narrative and actor sensemaking processes; enriching observation, aiding reflection and supporting researcher neutrality (Tonge, Moore, Ryan and Beckley 2013).

7.2 Focus groups

Johnson and Scholes’ (1999) cultural web framework aided examination of organisational culture and the deeper level assumptions, beliefs and shared artefacts of the actors within. The target audience for sessions
was middle management whose beliefs are notably influential in turbulent conditions (Coltman, Devinney and Midgley 2008). This provides an alternative means of surfacing narrative alongside STRIKE to achieve more complete understanding.

Four audio-recorded sessions were undertaken over 12 days: two contemporaneous in orientation and two retrospective, comprising 10 actors of equivalent position per group (N=40). Focus groups were selected for their capacity to observe collective sensemaking in praxis (Boje 2008), notably the relational action of storytelling which could not be achieved through individual interviews. Attention was afforded to semantics, semiotics and potential memory bias. To optimise conduits for expression, participants were provided with artistic materials alongside access to ArtPad (2013), a self-directional, engaging and connective web 2.0 drawing application and Wordle (2013), an intuitive visualisation tool which affords high participant control.

7.3 The assemblage and evaluation of narrative

The identification of narratives and indeed the selection of those offered for articulation in this paper, is based on employing a panoptic, reflexive and integrated range of interpretation approaches and analytical formats. Guidance was drawn from Green et al.’s (2010) discussion on tropological understanding, alongside Winter’s (2002) principle of dialectics, with a focus on polyphony or the means in which different voices may be heard. The researchers also adopted a critical reflexive and sensemaking stance to support emergent evaluation and questioning of data, including consideration of the impact of nostalgia and emotions on the narratives elucidated.

The evaluation draws on the work of Mello (2002) influenced by Mishler (1995), by endeavouring to collocate narrative data within context in order to benefit authenticity and produce coherent and cohesive findings. This involved the use of operations as a means of thematic boundary, specifically considering the forms of textual (patterns, symbolism, plot structures); transactional (physical and visual context, relationship between teller and told, purpose) and socio-cultural (social and therapeutic functions; cultural interpretation, ceremonial information). The depth and breadth afforded through the multiplicity of different data sources also aided this collocation process. Additionally, participant direct quotations are employed in an inter-textual relationship with the overall text, rather than as separate “adjuncts”.

Clandinin and Connelly’s (2000) three-dimensional narrative inquiry space provides an appropriate scaffold to introduce and assess situated findings, affording continuity by progressing through the dimensions of the past, present and future whilst considering the interaction between personal and social elements. Salient exemplars of narrative are presented and evaluated across the range of methods utilised, demonstrating multi-layered, collocated narrative interpretation in praxis.

8. The past

Focus group artistic output is revelatory of the strength of former culture, as illustrated in Figure 1.
A passionate response and evidence of the important historic and symbolic cultural context is afforded. The vibrant colour and imagery observed echoes the creativity and enthusiasm collectively exhibited, a confidence that anything is possible under “visionary” leadership. Traditions of innovation, creativity, space and norms of informal socialisation are also indicated.

During discussions, a sense of nostalgia and moreover grief for the past was evidenced in word selection, specifically the cumulative effect of choices such as “loss”, “recall”, “longing” and “mourning”. Equally, actors expressed a will for continuation using terms such as “resistance”, “preservation” and “entrenched”. The credibility and self-awareness of participants was noted in their adept use of linguistic devices including expressive sounds to emphasise a point, and by kinesic communication through purposeful body language. This echoes the dialogic/performance dimension of narrative discussed by Riessman (2008).

9. The present

Core dimensions emergent from the STRIKE assessment are presented in Table 1. These specific elements were selected for articulation as they were considered highly representative of the overall evaluation, on the basis of the consistency and coherency of themes which emerged using the collocated narrative approach. To aid transparency of this review process, an example is provided. Focussing on the photographic material, for each dimension over 20 images were taken and assessed through the operational analysis technique, supported by descriptive content coding in an approach congruent with the work of Tonge et al. (2013). From this evaluation a salient narrative emerges: a dominant discourse of dissonance. This description encapsulates differences in the interpretation of narrative meaning: an aesthetical juxtaposition between bold, individualised personal workspaces and neutral monomorphic public spaces; actor/ community petrification of officially defunct branding and the introduction of the “new” joint venture brand, and a tension between personal and organisational knowledge management. The surfacing of emotional narrative and identity articulation from physical and visual dialogue and associated folk-art symbolism is also illustrated. A pictorial, representational and logical level of interpretation is evidenced (Wittgenstein 2001).
**Table 1:** Elucidating the Salient Narrative through STRIKE: A Dominant Discourse of Dissonance.

<table>
<thead>
<tr>
<th>Environmental Element</th>
<th>Description with Photography</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Office Aesthetics and Workspace Decoration</strong></td>
<td>Disconnect is observed between public and private areas. The clean lines, precision and subtle branding of public spaces contrasts with the vibrant personalisation of workspaces which display Firm A branded artefacts. Personalisation of desks is typical, with objects (mugs, coasters) and team-building memorabilia associated with Firm A heritage and <strong>officially</strong> defunct branding prominent. This implies nostalgia, reflects pride and is revelatory of the importance of identity expression. It is also illustrative of culturally significant folk-art (Bruner 2002). Finally, there are examples of ironic humour such as snippets of newspaper cartoons in the style of them-us, notably the theme that the “workers” know more than senior management.</td>
</tr>
</tbody>
</table>

Firm-JV Public Presentation  
Workspace Decoration

| **Branding** | New Firm-JV posters and internal magazines lack characterisation and communication of values. There is minimal observation of actors wearing newly rebranded clothing. This “faceless” approach is a distinct contrast with the highly personalised, metaphorical, fun, visual and value-laden imagery previously used. This remains prominent in many workspaces, notably exemplars with motifs or metaphors associated with long-standing brand values or professional behaviours e.g. the productive, successful, caring “Busy-Bee”. |

Firm-JV Exemplar Poster  
Character-based Firm A Poster
Knowledge Sources

Employees and a few specific team groups maintain personal libraries and individual subscriptions to professional bodies which may indicate self-directed or professional grouping personal knowledge management norms. There is also evidence of the importance of image and demonstration of expertise, notably the publicising of personal knowledge stocks e.g. certificates and membership materials in desk areas.

Company magazines rather than industry journals are observed which infers a lack of external knowledge flowing into the firm. There is no evidence of organisational membership of industry professional bodies and no posters/leaflets to publicise benefits or associated events. A shared area that previously housed a continuing professional development loan-scheme library has been replaced with a space for external client meetings.

Exemplar Personal Library  
Replacement Library Space

The demonstration of Firm A branded artefacts, folk-art and associated value metaphors indicates strong cultural internalisation and is considered an example of representation and reification, aligned to organisational memory. It stands in contrast to the “imposed and negative change” synonymous with the new joint venture firm. It is opined that actor legitimisation is built upon this shared physical dialogue. Despite the contemporaneous focus and unobtrusive observational perspective of STRIKE, the narrative of the past remains omnipresent. The elements of STRIKE are indicative of two different landscapes and an overarching and dominant discourse of dissonance which maps along the pictorial-representational-logical configuration previously described.

This cultural disconnect aligns with focus group findings. The four cultural webs produced were evaluated to establish central themes, aided by radar chart comparison. Figure 2 is an innovative presentation of the aggregated data. This is a complementary, supportive tool rather than directly part of STRIKE itself, designed to provide synthesis and optimise communicability. It was created through a percentage conversation of participants individually instantiating a particular element of the cultural web whereby 100% equates to everyone agreeing to its importance. The order of the dimensions around the diagram is not significant: all aspects are equally weighted. 100% is positioned centrally to represent the convergence point of the dimensions of culture, facilitating awareness of the element(s) which most contribute to the underlying organisational paradigm.
Figure 2: Radar chart comparison of cultural webs

This perspective foregrounds the importance of Stories and Symbols to the pre-joint venture life-world as cited by 100% of participants. Such highly valued dimensions are disassociated from the new organisation as exemplified by the comment, “the only new stories are communication gaffs - a case of least said ....”. It is past sticky stories that are positively shared as a form of cultural continuation and identity assertion, as supported by the prominence of Firm A artefacts and value metaphors observed across STRIKE, ArtPad and Wordle.

10. The future?

Focus group ArtPad output provided consistently powerful interpretations of Firm-JV’s future, as illustrated in Figure 3. The ArtPad example was created by one participant and the Wordle visualisation produced by a subgroup with word size representative of their chosen emphasis.

Figure 3: Actor perspective of firm-JV’s future using ArtPad and Wordle
Elements of destruction, loss and a weakened position are emphasised alongside ambiguity towards a future that is synonymous with change. In the cloud visualisation, evidence of actor resistance is inferred from the selection of “preservation”, “defiance” and “holding-on”. Choices related to professionalism and technical skills are also expressed, which may be regarded as an assertion of expert identity as a means to navigate difficult change, aligning with the findings of Mahadevan (2009). The metaphor of “lit fuse” and “timebomb” is striking across both examples. From the evocative imagery a metaphor of DNA destruction is inferred: the building blocks of the organisation are being taken apart. This interpretation is supported by concerns raised in group discussion, exemplified by the comment “I feel like I am fighting to hold on to our heritage”, alongside the nostalgic symbolism identified during STRIKE evaluation.

11. Triangulation of narrative methods of inquiry

STRIKE findings were evaluated against those from the focus groups to explore the specific narratives or stories that are interpreted to underpin an overall emergent discourse of dissonance. The intent was to examine whether findings are confirmed, reversed, modified, supplemented or would benefit from additional inquiry (Kendall and Kendall 1984). In this research, a high degree of congruence is observed as demonstrated in Table 2, through two exemplar emergent stories of resistance to change and acculturative stress. These are both indicative of the importance of the actors’ self-conceptualisation of identity, continuance and professional influence through narrative.

Table 2: Matrix triangulation of primary narratives

<table>
<thead>
<tr>
<th>STRIKE Analysis</th>
<th>Focus Groups: Evaluation Across Conduits</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Story 1: Resistance to Change</strong></td>
<td><strong>Story 2: Acculturative Stress</strong></td>
</tr>
<tr>
<td>Continuing display of Firm A branded artefacts and folk-art through desk decoration, alongside literature with established cultural metaphors. The cumulative effect of physical symbols is powerful; they are tangible, omnipresent and can evoke a sensory response (Pratt and Rafaeli 2001). Certificates of expertise and adherence to respected standards are prominently displayed. Visibility of professional and technical knowledge is considered important.</td>
<td>Word selection infers resistance, notably choices such as “preservation”, “defiance” and “holding-on”. Particular responses are highly revelatory: “I feel like I am fighting to hold on to our heritage”. There is also a resistance tone based on professional and technical knowledge. Actors imply it is they that know what is in the company’s best interests: “It’s important to show we know what we are doing, that our skills can take the company forward, we need to make things happen as senior management don’t have a clue, especially matters technical”.</td>
</tr>
</tbody>
</table>

www.ejbrm.com 77 ©ACPIL
Juxtaposition between:

The prominence of artefacts associated with cultural heritage, reflecting pride and identity. Alongside the continuation of Firm A branded dress code, these ritualistic behaviours may be considered evidence of mimesis (Potolsky 2006). Desk space is highly personalised with demonstrations of individual eclectic dimensions: typically nostalgic, bold and blazoned in colour.

and:

The monomorphic, aesthetic design style of the new joint venture entity which is neutral and non distinct as exemplified by corporate posters which lack character and personalisation. Visual identity, established as an important element of pre-joint venture culture, is perceived as at threat.

Social comparisons concern less favourable organisational circumstances as opposed to the past, a potential indicator of acculturative stress (Vaara 2000). ArtPad and Wordle output is evocative of this condition, as exemplified by the “what is next?” statement and lit fuse and timebomb imagery. It is supported by focus group commentary:

“It feels too soon, I am mourning what we did before”.

Juxtaposition is perceived between personal and social identity. In Firm A social identity is strong:

“...it made you feel like you belonged; proud, confident and excited”

By contrast, identification with Firm-JV is currently perceived as an embarrassment:

“Communication gaffs are becoming legendary now... it’s embarrassing.”

12. Synthesising Discussion

In congruence with the study by Mahadevan (2009), actors employ multi-layered narratives as a means to construct themselves and to unite as a group. In this research, this specifically relates to preserving the self-conception of identity achieved through cultural, brand and value synergy with Firm A. Actors reveal lives strongly defined by the corporate lived self. This was a positive, aspirational experience pre-joint venture as this life-world afforded a distinctive personality, strong values and visionary leadership. A sense of loss and concern for continuity is evident with the preservation of motifs and symbolism of the former brand constituting a shared code of member-to-member communication. This sustains value homophily, behaviours and narrative memorialisation (Bell 2012). Narrative as identity is also related to asserting a perceived degree of influence or control through resistance narratives to overcome powerlessness; and by narrating professional expertise through the juxtaposing statements of their work value, skills and purpose, as opposed to the directionless leadership which “has no clue”.

Within the boundaries of “imposed and negative change”, there is evidence of ironic display (Johannson and Woodilla 2005) through humour; front stage dramatic display (Goffman 1969) via artefact presentation and the use of metaphor and decoration to maintain the critique of the Other, namely the organisational narrative espoused by senior management. Narrative brand processing (Escalas 2004), a way to facilitate a consumer connection is indicated here as a highly powerful narrative arc for the organisational actors working adjunct to it; a means to interpret the meaning of their experiences by fitting them into the brand story.

Firm-JV is indicative of an organisation held in tension, underpinned by a dominant discourse of dissonance. Reflecting on Aristotle’s three dimensions of rhetorical justification; logos, pathos and ethos (Brown, Ainsworth and Grant 2012), tension between competing logics is emergent. Individual and collective stories are striking for their emotion-evoking pathos; informed by history, established values and norms and imbued with nostalgia. This contrasts with the logos or logic focussed rhetoric which underpins the new espoused
organisational narrative, the approved rhetoric for change that is demonstrated in functional aesthetics and attempts at acculturation. The organisational story has become dissonant from both individual and the socially constructed collective narrative of the actors within.

Problems are identified in terms of narrative relevancy, coherence, future orientation, and core competency as encapsulated in the brand and its actor ambassadors. It is often assumed that reactions to market conditions such as joint ventures cause creative destruction (Schumpeter 1942), but there remains a danger that competences which are core but hard to articulate are in fact unintentionally destroyed.

12.1 Methodological benefits and the contribution of STRIKE

The overall approach demonstrates a robust methodological bricolage which addresses “the need for multiple ways of seeing” (Kincheloe, 2005, p327). It is argued that the integrative, multi-layered, reflexive and triangulated approach can enable the resultant narratives of research (Clandinin and Connelly 2000) to be more grounded and therefore, more likely to be valid and authentically representational. Polyphony and narrative richness is addressed through the adoption of an inventive, systematic and multi-layered combination of data collection, analysis, integration and articulation techniques. These allow the semantic layer to become more transparent. Increasingly granular understanding of how meanings are constructed, maintained and used by organisational actors becomes possible. In this case, it identifies significant dissonance between the actor narratives and that espoused by the organisation.

STRIKE richly elucidates the importance of human interaction with the physical as well as the social environment to create meaning echoing the social practice findings of Suchman (2007) and enhancing understanding of how actors make sense of and respond to their life-world. The method is congruent with the sociomateriality dimension of this study, surfacing the influence of non-somatic artefacts on narrative development and expression, and providing deep interpretative insight into actor sensemaking processes. The STRIKE framework affords potential to operate in diagnostic and prescriptive mode regarding the issues identified. As an example, the framework can be used in diagnosis to indicate organisational change; the case firm could be said to be an adhocracy moving to a machine configuration (Mintzberg 1980). In prescription, a focus on the findings pertaining to specific elements can aid targeted intervention mechanisms.

For the researcher, STRIKE’s systematic approach to data analysis and assessment mitigates criticisms of methodological rigour in observational techniques and affords standardisation potential, appropriate for verification and longitudinal studies. Fully combinable with interactive qualitative methods, STRIKE can also confirm, negate or explicate findings as part of triangulation. For the practitioner, reflecting on the organisational development challenges expressed by Gallos (2006), the method can afford benefits to support diagnosis and prescription, targeted interventions, overall change management, organisational health and cultural benchmarking. It is argued therefore that STRIKE presents particular value for bridging the frequent dissonance between theory and practice, with usability for researcher and practitioner. For an audience, the highly communicable and visual style allows “the reader into the process” (Dickie 2003, p51) of interpretation and analysis.

The creative techniques ArtPad and Wordle also demonstrated effective contributions to support polyphony. As explored by Hoang and Kjorlien (2008) in the contemporary art domain, “ArtPad embraces a fragmentary and causal way of connecting parts to a story that resists the static structure of a beginning, middle and end”. One participant commented that they found the technique gave freedom and control to respond to the topic “on their terms”. Wordle was also beneficial and enabled the participatory production of culture visualisations by members of the group themselves, echoing the intent of Viégas, Wattenberg and Feinberg (2009).

Finally, the authenticity of representation aim is supported across multiple facets of the inquiry. The approach affords a multiplicity of perspectives, using direct and indirect techniques and a creative range of conduits for
expression. This is opined to optimise the potential for participant engagement to encourage a depth, breadth and richness of data and further, reduce the potential risk for misinterpretation and distortion (Tversky 2004). These methods are also multi-layered and transverse situated physical, textual, linguistic and visual dimensions.

Techniques such as the collocation of data and matrix triangulation, alongside process transparency, are also effective and support traceability and comparison of the emergent narratives. Finally, the insider-researcher principal investigator position was effectively supported by the outsider member role of the co-author; providing balance, aiding critical reflection and creating a creative space for interpretative dialogue (Dwyer and Buckle 2009). It is argued that this overall methodology reduces the potential for the misinterpretation of narrative (Heje, Baskerville and Venable 2012).

13. Conclusions

This research responds to the call for a more holistic (Smeyers and Verhesschen 2001), diverse (Riessman 2008) and authentic (Holloway and Freshwater 2009) perspective towards narrative inquiry which optimises the potential for participant voices to be heard. It also promotes wider discourse on narrative analytical process techniques (Mello 2002) and contributes to the advancement of people-place theory using visual methods (Tonge et al. 2013). The study foregrounds a structured, cohesive, multi-layered and polyphonic approach to surface, evaluate, integrate and articulate a multiplicity of perspectives, benefiting authenticity of representation, process transparency, researcher reflexivity and the capacity to judge quality (Speedy 2008).

The structured use of innovative multi-method, multi-layered and multi-textured tools enables multiple lenses on narrative as part of methological bricolage, encapsulating actors’ physical, textual, linguistic and visual dialogue. The STRIKE framework demonstrates notable benefits as an unobtrusive, integrative and systematic tool, germane for usage in verification and longitudinal narrative inquiry. STRIKE’s capacity to be deployed in opposite directions of inference viz prescriptive or diagnostic mode affords particular pragmatic potential. Further, creative techniques such as ArtPad and Wordle provide rich expressive control to the participants and surface new conduits for narrative dialogue. It is argued that this overall approach can facilitate the development of full rather than minimalist narratives, moving beyond elements of time and space to explore and surface dimensions of causal relationships, voice and emotion (Tversky 2004).

The research supports the pictorial turn (Mitchell 2005) as a counterpoint to the widely recognised linguistic turn in business and management research: combining synchronic and diachronic elements of story to provide new means of seeing (Bell 2012), both for researcher and audience. Further, the importance of organisational historiography is revelatory; providing a means to contextualise issues and enhance comprehension. Although historical knowledge should not dictate current perspectives, it is argued that it provides a prism in which to view, reflect upon, interpret and evaluate findings which can benefit research investigations and practice interventions (Down 2012).

The study specifically elucidates the complex and intersectional sensemaking processes of organisational actors, with the overarching discourse of dissonance between the authorised corporate and lived actor experience of narrative richly interpreted. Further, the social context of authenticity also emerges strongly. As Williams (2004, p200) asserts: “we need each other in order to be anybody”. The study demonstrates the association between transformational change and the use of narratives to maintain, recreate and/or reinterpret individual actor and/or collective group identity, advancing the work of Mahadevan (2009). The importance of human interaction with the physical as well as the social environment to create meaning is foregrounded.

Although there is no evidence of the dark organisational miasma or extreme toxicity developed by Gabriel (2012), a deep concern regarding cultural, value, brand and core competency erosion and the changing
superordinate goal is nonetheless identified. The rich intellectual capital of this organisation can be perceived to be at risk. The petrification of narrative is employed by actors as a form of continuance, of identity preservation, memorialisation and moreover assertion, which may be interpreted as their most accessible form of resistance to change.

Acknowledgements


References


Promoting the case for Using a Research Journal to Document and Reflect on the Research Experience

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Abstract: This paper draws upon a personal research journey and makes the case for recording this experience using a research journal. The context for this paper is based on a study of family life and leisure, which collected data using more traditional qualitative methods, namely focus groups and interviews with pre-birth and post birth couples and leisure managers in New Zealand. The research design for this study was based on phenomenology, where the experience of the subjects being studied was significant and involved developing an understanding of the lived experiences of pre-birth and post-birth couples, where the way they acted was dependent upon their understanding and meaning of their behavior (Waters, 1994). This paper draws on the researcher’s own reflections recorded in a research journal, whilst undertaking this research study over a five year period. The paper discusses the meaning and importance of reflection as a way of evaluating the researcher’s own research journey and highlights a number of issues with reference to the validity of such data. The paper concludes by revisiting the key benefits of reflection and affirms the belief that research journals are a useful tool, which enables the researcher to record personal thoughts and observations in a systematic manner.

Keywords: personal, research journey, phenomenology, observing, writing, journal, reflection, qualitative research

1. Introduction

The main purpose of this paper was to examine and record the researcher experience in the field, through the use of a research journal to help fill the gap in the research literature. Dewey (1933) identifies that reflective writing practices are principally concerned with giving serious thought to experiences that are unfolding in order for the researcher to examine and evaluate their experience, rather than focus on the research outcome (Murray & Kujunzic, 2005). This was the same approach, utilised in composing this paper, whereby the research journal provided the means to reflect on the research experience and produce viable data. However, according to Borg (2001) there is insufficient literature on the use of research journals in qualitative research and minimal guidance on how to use them. Whereas, in the training and education of teachers, the reflective journal is common practice and central to their professional development (Brookfield, 1995).With regard to the professional development of researchers, little is known about the benefits of using research journals. Furthermore, it seems that using a research journal to capture additional data is underdeveloped amongst qualitative researchers (Robson, 2011).

1.1 Outline of the paper

The first section of this paper explains the key concepts of ‘reflection’, the method used to record the personal observations of the researcher. This is followed by an explanation of how a research journal was used to document the researcher’s experience during the study on family life and leisure used as the context for this paper. Next, a number of excerpts sourced directly from the research journal are presented and evaluated with reference to the study highlighted above. The paper concludes by reaffirming the benefits of using a research journal and encourages both academics and researchers in the business and management disciplines to consider using this method to record their own personal research journey.
2. Recording the experience of research

Reflection involves an action or as Boyd and Fales (1989, p.101) asserts is concerned with "the process of creating and clarifying the meaning of experience (present or past) in terms of self (self in relation to self and self in relation to the real world)". Within, the research study, this required documentation in the form of a research journal to record and to reflect which Yinger & Clark, (1981) argue gives reflection more purpose and power (and furthermore the process of “reflection helps to bring the unconscious into consciousness" (Ortlipp, 2008, p.698.). This involved thinking about the research critically to record thoughts in order to evaluate the experiences to give what Ellis (2001) refers to as ‘a measure of perspective’. Keeping a research journal helped to clarify ideas and develop linkage between different parts of the research process which Schön (1991) has argued helps bridge the gap between theory and practice. Reflection is largely a cognitive activity involving higher order thinking processes (Wertenbroche & Nabeth, 2000) to analyse, reconsider and qualify our experiences as a researcher (Murray & Kujundzic, 2005).

The act of writing or expressing thoughts onto paper (Cui, 2012) helped facilitate the process of reflection in expanding, ideas to further develop the research from which it was possible to draw conclusions at a later date Jasper, (2005, p.250) confirms this assertion and provides a more detailed account, in that “reflective writing is, by its very nature ....written in the first person and is essentially subjective [and is connected] to the experiences and perceptions of the author”. Learning about research from recording our experiences has the potential to develop a range of research related skills including critical thinking, analysis and creativity. By writing through reflection the researcher is able to facilitate new understanding as information is first perceived then reflected upon in the act of writing. This process acted to represent the researcher’s experience of the research first-hand and gave meaning to the research leading to what Jasper, (2005, p. 248) refers to as “understanding and learning about practice” Moreover, by the art of reflecting, the researcher was able to provide evidence and build research experience. , “ Jasper, (2005, p.250) concurs with this observation when commenting that reflection “facilitates the researcher’s discovery [in compiling] a veritable audit trail of the research process However, caution is required to be mindful of the researcher’s role in deciphering how the insider-outsider research continuum impacts on the depth of insights that can be gained from the research participants (Cui, 2012). On the contrary, it could be argued that journal writing lacks objectivity and there is a danger of over indulgence of the ‘self’ in embellishing what is recorded. Reflecting on different aspects of the research process when writing a research journal provides a forum to record concerns which may have otherwise been lost, or as Nadin and Cassell, (2006) note, simply not considered.

3. Developing the case for using a research journal

As part of the journey through the process of completing the study on family life and leisure, a research journal was compiled to document the personal experience of the researcher. For this purpose, personal feelings and thoughts were recorded in note form in a research journal after the research proposal was confirmed until the study on family life and leisure was completed in full. During more intensive periods of the research process, which included undertaking the focus groups and interviewing couples, there was obviously more detail to record and this occurred on a daily basis. However, at less intensive periods of the research process, such as times when making arrangements for the focus groups or interviews, thoughts were recorded on a weekly basis and reflections were more subject to time lag and possible memory loss. To help structure the research journal, each page of the research journal was divided into four sections. Section one recorded what went well, section two recorded what did not go so well, section three recorded key learning points from the experience and section four referred to evidence to substantiate the comments made in the previous three sections to provide further evidence to justify the reflections that were made. Writing the reflective journal allowed the researcher to acknowledge thoughts and emotions. Writing the research journal provided a means to communicate feelings and opinions to make them what Ortlipp (2008) has described as visible. The writing of a research journal is one of a number of methods of reflection that a researcher can utilise to record their experiences in a simple and effective manner.
The research journal provided an outlet for observations that were not recorded elsewhere and encouraged critical analysis and critical thinking, both key research skills in qualitative research (Patton, 2004). Writing the journal provided time out to think about the research and make informed decisions of what was important and critical and what was not. The practicalities of recording thoughts on the focus group process and interviews suffered some time lag in the recording of some of observations recorded in the journal. This had the potential to impact upon the quality of the research journal, primarily influenced by the researcher’s memory. This is one of the limitations of using this method to record experiences, as the researcher needs time and space to record their observation. Ideally, this needs to happen as soon after the experience as possible, which in the case of this research study was not always possible. Nevertheless, the strategy that was adopted during the research study meant that time was set aside as part of the research plan for the purpose of compiling the research journal. This proved to be a useful exercise to analyse thoughts during the research study period in a systematic way. In reflecting on the research process it was possible to focus on thinking and looking in order to understand the research experiences as they unfolded to question beliefs and expectations which Gidman (2007) argues develops the researcher. For example, during the early stages of planning the interviews with couples it was intended to just interview them together. However, as a result, of reflecting on the gender dimensions of the interview process with couples in the research journal, it was decided to interview couples on their own. This allowed each interviewee to talk more freely without interruption from their partner. The process of reflection helped in examining and evaluating the research methods utilised, rather than focusing on the outcome of the research (the data). Through reflection it was possible to gain additional insights in relation to the lived experiences of the individuals involved in the research, which helped facilitate a deeper level of questioning, which is at the core of qualitative research (Alaszewski, 2006).

In the planning stage of the research study it was intended to run the pre-birth focus group for one hour, when couples had arranged this time to be available. In reality though, this focus group ran over time as conversations often turned to many different areas of discussion that were not necessarily relevant to the research project. This only became clear after reflections in the research journal had been first documented then read. As a result, a much tighter rein was kept on the post-birth focus group discussion by following the pre-determined questions more closely. This still allowed for flexibility, but gave the post-birth focus group discussions more direction and purpose in line with the key research questions. The knock on effect was that the skills of the researcher were enhanced in undertaking and managing the focus group meetings. This eventuated as a direct result of recording personal observations in the research journal. Furthermore, during the focus group discussions and interviews it was possible to reflect on hidden data, concerning the feelings, attitudes and emotions that research participants were expressing. Without using a research journal this detail would have been lost to the researcher.

4. Putting the theory into practice

Gaining insights into the world of the researcher is often problematic, but the compilation of a research journal provides a window into their experience through personal reflection and can be utilised as an important methodological tool in “contributing to the trustworthiness of a research study” (Jasper, 2005, p. 248). This has the potential to provide the researcher with information to discuss less well documented issues in research with their research supervisor and can help identify any research difficulties or problems from the researcher’s perspective that might not be evident to the supervisor. Compiling information in a research journal provides evidence and another source of data for the researcher which “becomes a tangible way to evaluate our own experience, improve and clarify one’s thinking and finally become a better scholar” (Janesick, 1998. p.24).

The data presented in a research journal can be used as another form of data and to supplement primary sources of data. Also, as (Jasper, 2005, p.256) notes the “data contains the researcher’s interpretation within
their own cultural, social and experiential parameters”, which can be very empowering to the researcher (Finlay, 2002). However, one of the limitations in terms of research outputs which all academics are subject to, in universities worldwide is the observation that accounts of reflective writing are often very difficult to publish or disseminate (Finlay, 2002). Nadin and Cassell (2006, p.210) believe this is often due to “the positive hegemony that permeates many of our research outlets”. During the study on family life and leisure, the research journal became a useful vehicle to document experience and had the potential to increase the awareness of the ‘self’ in research as an individual and as a professional (Borg, 2001).

The journal acted as a vehicle to improve researcher development and “enables the researcher to continuously think about their own research practices and assumptions, by recording their thoughts in a systematic way” (Nadin & Cassell, 2006, p.210). However, there is a lack of guidance on writing reflectively in the research literature. This is especially the case for novice researchers with regards to “the purposes of keeping a reflective journal from a methodological perspective and how to use their perceptions as an integral part of the research process” (Ortlipp, 2008, p.696). Clearly more work is needed in this area to give future researchers the opportunity to record their experiences in a logical and structured manner to later utilise as a source of data for their research, thereby using the data (practice) to inform the theory.

5. The research excerpts

In this part of the paper, five of the key issues (excerpts) are presented that emerged as part of writing the research journal based on the researcher’s experiences throughout the time of the research project. In essence, the process of recording reflections by the physical act of writing became another form of data. When writing up the findings, the researcher was able to refer to the research journal and provide further evidence to substantiate the key themes that arose as part of the study. Each excerpt below is given a title to reflect its content and is related to the broader context of the study to give meaning. This provides the reader with insights into the study from the researcher’s personal perspective, which was only made possible by the compilation of a research journal.

5.1 Excerpt one- the context of the paper

The researcher’s initial interest in family life and leisure as a viable area of study can be traced back to his own personal experience, when becoming a parent and the impact, this significant life event had on his own life and leisure. As a ‘first-time’ parent, he was able to build rapport during the focus group studies and interviews with pre-birth and post birth couples to establish context. According to, Creswell, (1998) this has the capacity to build trust and confidence, enabling this study to progress In this research study, it was possible to gain glimpses into the lives of couples experiencing a similar life event to the researcher. Cui (2012) has described this as ‘insider research’ where the researcher has some familiarity and connection with the people they are researching. This was the case in the study on family life and leisure, although it is important to be mindful that the researcher cannot claim to have uncovered the ‘real truths’ about family life and leisure. Nevertheless, the study on family life and leisure has contributed to the literature and debates surrounding family life and leisure. Within the research journal, personal observations are recorded with respect to the initial contacts the researcher had with the research participants.

5.2 Excerpt two - qualitative methods

In this study, as proposed by Mittelstaedt (2002, p.152), a range of qualitative methods was used to make it, “possible to assess each method used, providing information on their limitations as well as their strengths and clarifying their presuppositions and their consequences”. The research journal provided a means to record thoughts on these issues. By adopting a qualitative approach to seek out the opinions of couples, the researcher sought to add to the research methods literature and offer additional insights into the lived experiences of couples, from a male and female perspective using both focus groups and interviews. The focus group studies combined with the interviews from a user and management perspective facilitated a deeper
understanding into the phenomenon of family life and leisure. Moreover, by using both methods it was possible to ensure a deeper level of questioning, which led to a better understanding of the lives of couples involved in the study. Observations recorded in the research journal, both supported and confirmed the data recorded, which used more traditional methods of qualitative research (Patton, 2005).

This story is obviously selective, as ultimately decisions were made concerning what would be included in the final version of the study, with reference to the thoughts recorded in the research journal in the early stages of the research. At the conclusion of the pre-birth and post-birth focus group studies notes were taken as described in the paper earlier and this was replicated at the end of each focus group and interviews with pre-birth and post-birth couples and with leisure facility managers. This was a difficult and challenging task at times, as the primary purpose during the focus groups and interviews was to concentrate on the participant’s feedback. Taking notes immediately after each focus group and after each interview was at times inconvenient and impractical, but provided very useful evidence for the research journal and another source of data for the research study.

5.3 Excerpt three- the research participants

Gaining the confidence and trust of those selected as research participants was initially problematic, in the early stages of the research. However, prior to the design of the methodology, informal meetings were arranged with both men and women at the pre-birth and post-birth stages to clarify the purpose of the research. Consequently, their trust and willingness to participate in this study was acquired, which is a key factor in motivating people to give up their time to take part in research studies (Kenny, 1996). Also, the researcher had empathy with their experience as he had personally encountered many of the same challenges that expectant couples and first time parents face, which were recorded early on in the research process and reflected upon when the research went live. Assembling the focus groups took a lot of time, effort and energy and although many participants had initially given their consent to take part, they still needed further encouragement, persuasion and reminders. Observations surrounding some of the problems encountered in this respect were recorded in the research journal then later used as a tool to manage this process more effectively. In reality, this was achieved through more purposeful and regular email contact with the likely research participants and at a later date a number of personal phone calls to encourage their full commitment to the study. Therefore, regular and constant communication recorded in the research journal as one of the key issues in recruiting research participants was the key to elicit their involvement in the study. Both the pre-birth and the post-birth focus group participants were concerned that they might be discussing highly personal and sensitive matters with people they might not know in the focus groups. Consequently, some individuals needed re-assurance of the processes involved and the fact that the research findings were to be confidential. This reflection was recorded in the research journal and as a result of experiences in conducting the pilot studies with pre-birth and post-birth couples. During the pre-birth and post birth focus groups and interviews, couples were provided with more detailed guidelines on how the focus group conversations and interviews would be evaluated and analysed. In particular research participants were initially concerned about the confidentiality of information provided and their concerns were met, after they were reminded that their comments would not be identified in the write up of the research study. Also, all pre-birth and post-birth focus group and interview participants were sent a summary of the findings of their discussions by email and asked for comment, before the findings were confirmed in written form as part of this study. This was a suggestion that was made note of in the research journal as a consequence of the pilot studies.

5.4 Excerpt four- the research study

The justification for using interviews for the study on family life and leisure was based on the premise outlined by Behringer (2006) as interviews are capable of producing rich, detailed information about the meaningful dimensions of lived experience, the dimensions being family life and leisure. This objective was directed towards allowing interviewees to describe the world as they perceived it, to be described in their own terms.
and to highlight what ‘things’ and events meant for them. The interviews with couples took a lot of time, negotiation and effort on the part of the researcher and were more problematic than the individual interviews. During the couple interviews, the researcher was conscious of one person dominating the other and the need to be careful in causing offence or conflict between couples on sensitive issues that arose. Nevertheless, a number of couples did argue with each other during the interviews, but fortunately disagreements never got out of hand. The couple interviews offered insight into the interactions and nature of the relationship between couples, which were recorded in the research journal. Nevertheless, the researcher had to be mindful that the couple interviews were more likely to produce consensual data, where they might be an attempt to generate a unified reality (Paul, 1989). Also, the researcher was fully aware of possible inconsistencies in the data, in that the construction of events during individual interviews might be quite different, when compared to the couple interviews. This observation was noted in the research journal on a number of occasions when some couples expressed opinions and information that was contradictory when comparing what they mentioned during the solo interviews, when compared to their interview with their partner. Observations noted in the research journal at the pilot stage of the research identified that women often dominated the couple interviews. Therefore, during the interviews study a conscious effort was made to encourage men to contribute and be more engaged in the interview discussions. As part of this strategy, ideas to encourage men to be more open and active in the interviews noted in the research journal were then put into practice. Fortunately, these concerns did not eventuate as men’s engagement in the interviews was actively encouraged.

The pre-birth and post-birth couples were generous enough to give up their time, for both partners to be there at the same time for the pre-birth ‘couple’ interview and for the post-birth couples arranging childcare so the interviews could go ahead. Flexibility was required in terms of times and dates and it was not unusual for parents to cancel their pre-arranged interviews at short notice. When arranging the interviews for post-birth couples it became clear that contingencies had to be planned for, as the demands of parenting were often unpredictable (Shaw, 2008). As a result, a number of interviews had to be re-arranged for a number of post-birth couples at relatively short notice.

Also a number of interviews had to be re-arranged for pre-birth couples that were in the last trimester of their pregnancy, due to tiredness and stress and some simply did not feel like taking part anymore. Obviously, looking after a young child or dealing with the demands of pregnancy were a lot more pressing than undertaking a study on family life and leisure. Again the research journal provided a useful vehicle to document my thoughts on the realities of pregnancy and parenting. Nevertheless, most couples were accommodating and did their utmost to meet pre-arranged interview dates. Some interviews took much longer to undertake than anticipated, which impacted upon the time management plan for the rest of this research study. Fortunately, a number of contingencies had been put in place which allowed extra time for the interviews to be completed.

Generally, families were very generous with their time and most spoke openly about their feelings and thoughts and most interviews became a kind of conversation, where, interviewees were able to speak for themselves (Tolich & Davidson, 1999, p. 60). The majority of the interviews took place at the home of the interviewees, where they were intimately familiar with their surroundings and where most felt relaxed and comfortable. Throughout the interview stage, the researcher was conscious of the guiding principles outlined by Tolich and Davidson (1999, p.109) were effective interviewing should be concerned with, “asking the right questions, in the right way, while ensuring you accurately record people’s responses to these questions”. A number of interviews were undertaken at the workplace of the interviewee, as this arrangement was more suitable and these interviewees reported being more comfortable with this arrangement. In general, the interviews were enjoyable, evidence of which can be found in the research journal as after each interview the researcher’s thoughts were recorded. Undertaking the interviews became a source of motivation and helped progress and give impetus to the research study, which was alluded to in the research journal.
After the interviews were completed, other discussions would often ensue on a range of different issues, not all necessarily linked to the topic of this study, but still interesting. During many interviews food and drink was offered to the researcher and on one occasion a three course meal and after one interview that had progressed into late evening, a bed for the night was offered and politely declined. At the end of each interview, interviewees were asked to reflect on their interview experience and their feedback provided useful information for the research journal. During the solo interviews, individuals remarked that they had enjoyed their interviews, especially the one-on-one interaction with the interviewer, as this helped them remember important details about the questions they were asked. In particular, they appreciated the open-ended nature of the interviews they were involved with, as this gave them the flexibility and opportunity to express themselves freely in their own words. The ability to listen and later reflect in the form of writing in the research journal was important in this respect. As a result, valuable data was compiled in the research journal and made visible with regard to the researcher’s feelings, thoughts and opinions that would not have been recorded elsewhere.

5.5 Excerpt five- Interviews with leisure facility manager

Completion of the manager interviews took a long time to arrange, because many of the managers were very busy and had to cancel interview appointments on several occasions. This was frustrating at times in terms of progressing the research, but patience was required as managers had given up their time freely to be involved in this study. Many of them had to cancel initial interview appointments, as they had other priorities that had arisen between the time they were first contacted and the original date the interview was arranged. In order to plan for this contingency, each manager was asked to offer two dates for a possible interview. If the first date was cancelled, which it invariably was, a second date was still available to fall back on, which in some cases was confirmed. This risk management strategy in using contingencies seemed a good idea in practice, but in reality a number of managers had to cancel both dates. In the majority of cases, the ‘actual’ interview took place on the second or third date that was agreed upon. However, in the case of two managers, the actual interview took place on the fourth arranged interview date. The interviews were largely enjoyable and useful insights were gained into key research issues, from a management perspective. Both positive and negative experiences were recorded in the research journal, and it became apparent that conducting interviews was ‘hard work’ (Rothman, 1986). Nevertheless, the researcher had the opportunity to reflect on the realities of undertaking research with busy people.

6. Summary

In this paper, the practicalities and purpose of writing of a research journal were outlined as an important qualitative research method to learn about the experience of research and gather invaluable data. Within this paper, it was argued that writing a research journal is critically important to the documentation of the researcher’s personal research journey and help validate the authenticity of research data collected using this method. Narratives that derive from research journals have the capacity to better inform other researchers. In particular, early career researchers are more able to learn about the realities of research, “not available from any other sources” (Borg, 2001, p.160) via discussion and analysis of researchers’ journals. Moreover, it seems there is a lack of guidance in the research literature and academic debate on how to do it and the difficulties and practicalities involved.

Although, the research study (family life and leisure) used as a case study in this paper does not specifically relate to the business/management research field, the experiences outlined within this paper are relevant to all researchers who are considering ways in which they can be more reflexive. In this paper, the major objective has been to describe the use of a research journal in a specific context (family life and leisure research). This context is useful and of interest to those involved in other types of research as the issues and concerns raised in this paper are evident in all types of research. The paper provides a real-life insight concerning the practicalities and challenges of writing a research journal to encourage other researchers to
consider using this method, as Ortlipp (2008) notes this type of research is, neglected in mainstream research methods taking time out from the ‘doing’ of the research and finding space to compile a research journal provides the opportunity for the researcher to put reflection into practice by creating and clarifying the meaning of their own experiences “in terms of….self in relation to self and self in relation to the world” (Boyd & Fales, 1983, p.101). All those involved in the business and management research need to seriously consider adopting this strategy as part of their research plan. It is apparent that reflecting on research is now a key issue for qualitative researchers in the social sciences and could potentially be an issue in the business/management field (Nadin & Cassell, 2006). Although, management and business research has been dominated by the use of quantitative methods to help justify their claims as such methods produce quantifiable evidence (Mittelstaedt, 2002).

References


Narrative Inquiry and the Study of Collaborative Branding Activity

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Abstract: This paper examines the distinctive features of narrative inquiry, reviews how narrative has been taken up in a range of disciplinary areas, and argues for the use of a narrative approach to the study of social processes in marketing organisation. An illustration is provided of narrative analysis of an exemplar case with the aim of surfacing tacit knowledge and drawing lessons from practice on a successful collaborative branding activity. A series of practices, including accounting, justifying and empathising are identified as important in the development of this emergent branding project. The findings resonate with Boje’s (1991) contention that being able to perform stories is an underrated yet important management skill that can assist organisation members to make sense of what is going on and to effect change.

Keywords: narrative, narrative inquiry, branding, cross-sector partnerships, collaboration

1. Introduction

Narrative inquiry has at its core a focus on the study of experience as it is lived. This directs attention to narratives as a means of studying aspects of society ‘finding meaning in the stories people use, tell and even live’ (Ospina and Dodge, 2005: 143). In this paper we examine the distinctive features of narrative inquiry, briefly review how this approach has been taken up in a range of disciplinary areas, and illustrate the use of a narrative approach to explore collaborative branding activity in a regional food and wine district in regional Australia.

Why should researchers engage in narrative research? To appreciate the contribution of narrative inquiry, Dodge, Ospina and Foldy (2005) argue, requires: (1) deep knowledge of the logic of narrative inquiry; (2) an acknowledgement of its diverse approaches; and (3) attention to judging its quality. We will use these points to frame the discussion to follow on the nature, scope and use of narrative research. The subsequent presentation of a case analysis will highlight in a specific and concrete way some of the possibilities available when implementing a narrative approach. Our purpose in undertaking this particular research was to draw lessons from practice though detailed analysis of an exemplar case. We wanted to surface tacit knowledge and identify key practices involved in mobilising diverse stakeholders in the development of an emerging cross-sector partnership. Tasked with building awareness, visitor numbers and reputation for a regional food and wine district.

A narrative approach is well suited to ‘illuminating the social world’ (Ospina and Dodge 2005: 151) and its use opens up new possibilities for examining collaborative branding activity in emergent cross sector partnerships in ways we argue promote a more complex understanding of the dynamic and relational aspects associated with this multi-stakeholder activity. Using a narrative lens to study a process reflects the temporal orientation of narrative and means that the process can be studied through an unfolding story. Narrative work can also focus on construction of identity – individual or collective.

This paper unfolds in a series of stages. First, we provide a background on narrative inquiry and outline guiding principles for designing and conducting narrative research. This is followed by a narrative analysis of an exemplar case study of a cross-sector branding project. Finally critiques, limitations and contributions of narrative inquiry are canvassed.

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2. Background to narrative inquiry

Narrative research is interdisciplinary in its origins, including elements of literary, historical, anthropological, sociological, psychological and cultural studies (Casey 1994). Renewed interest in narrative from the 1980s can be seen in a range of fields including psychology (Bruner 1986; Mishler 1992; Gergen 1992; Polkinghorne 1995), education (Connelly and Clandinin 1999; Casey 1994) and sociology (Denzin 1997; Gubrium and Holstein 1998). Narrative has secured its place in social science research, as Denzin and Lincoln declared, 'Today few in the interpretive community look back with scepticism on the narrative turn. The turn has been taken, and that is all there is to be said about it' (2003: viii).

Narrative inquiry is based on the premise that, as human beings, we come to understand and give meaning to our lives through story. Narratives compose and order life experiences. By being structured and recounted through story form, experiences are accounted for and given meaning and significance (Usher 1997). Narrative can be characterised as a ‘way of knowing’ (Hatch and Wisniewski 1995). Jerome Bruner, was influential in gaining credibility for the use of a narrative approach in psychology, a discipline that had been dominated by experimental studies and a concern with prediction. In Actual minds, Possible worlds, Bruner (1986) argues that narrative modes of knowing function as a central form of human thinking. Stories are a way of knowing and have knowledge in them. He contrasts this mode of thinking with the dominant logio -scientific based on proof, argumentation and hypothesis driven discovery. So the turn to narrative can also be viewed as a turn away from inquiry that aims to establish universal relationships between abstract concepts (Fenton and Langley 2011).

The narrative turn has opened up new pathways for research that focus on interpreting social events and understanding the intentions and meanings of social actors, rather than just explaining and predicting their behavior (Dodge, Ospina and Foldy 2005). Narratives are suited to representing social phenomena in their full richness and complexity (Hinchman and Hinchman 1997) and can provide a particularly generative source of knowledge about the meaning people find in their everyday working lives. In narrating, a narrator communicates and captures nuances of event, relationship, and purpose. These would be lost in the abstraction process central to the logico -scientific model - where abstraction permits categorisation and correlation with a focus on propositions or rules that connect categories of behaviour to categories of actors and situations. In contrast, narrative thinking places these elements into a sequenced, contextualized statement with a plot (Tsoukas and Hatch 2001).

Growing interest in and use of narrative inquiry coincides with a greater interest in process. ‘Narrative models of knowing are models of process in process … personal narratives describe the road to the present and point the way to the future’ (Josselson 1995: 35 as cited in Goodson and Sikes 2001). It should be noted, however, that the narrator’s view of the process is through a lens of the present, a retrospective account of process.

Narrative approaches have made a considerable contribution to management and organisation theory. Rhodes and Brown (2005) in a comprehensive review of narrative approaches in management and organization theory, identify five principal areas where a narrative inquiry has been directed: (1) sense –making; (2) communication; (3) learning/change; (4) politics and power; and (5) identity and identification. They identify several key contributions of narrative research in organisations - a focus on temporal issues, a way to view processual characteristics of organisations and to analyse the continuous construction of identity.

A narrative approach is appropriate in situations where researchers aim to understand in an integrated and temporally coherent way (Rhodes and Brown 2005) complex social processes and life as it is lived. ‘Narratives are forms of social action… they are inescapably social phenomena… they are produced and circulated in social contexts’. (Atkinson and Delamont 2006: 169). Narrative research has the capacity to reflect the complexity of individual and social lives, the ambiguity and the contradictions. It can elicit practical and personal knowledge stories that can be used to understand and communicate subtle aspects of tacit knowledge and organisational
life. Further, attention can be focused on social, institutional and cultural practices that shape narratives and the construction of identity both personal and organisational.

As the ‘narrative turn’ enters its fourth decade there is considerable concern being expressed about the need to clarify and defend the boundaries of narrative inquiry to preserve its distinctiveness and rigour (Sector-Mersel 2010). As narrative research has increased in popularity there has been a corresponding propensity for low quality research that appropriates the terminology of narrative while disregarding its complexities (Clandinin, Pushor and Orr 2007).

While there is diversity and pluralism, there are certain defining characteristics of narrative research that are generally agreed upon. In the following section we discuss these features and how they inform and guide the practice of narrative research. This discussion is in no way exhaustive or definitive but is designed to provide a sketch out the boundaries and issues involved in narrative inquiry.

3. Engaging in narrative research

Narrative inquiry is diverse. This diversity, in terms of origins, methods and disciplines, is highlighted consistently in handbooks, chapters and articles on narrative (Sector-Mersel 2010). How research is conducted will reflect the researcher’s interest and assumptions about the world (Rosenwald and Ochberg 1992). The field contains realist, postmodern and constructionist strands makes agreement on a range of issues difficult. There is no template for a narrative research study. Narrative work, however, is always interpretive from the framing of the conceptual question, selection of participants and the gathering of narrative material, through to interpretation and representation of findings (Josselson 2006).

Five key characteristics of narratives can be highlighted (Ospina and Dodge 2005) and these help to create some sense what is meant by the term narrative in narrative inquiry as distinct from the increasing common colloquial use of the word. Narratives are: (1) accounts of characters and selected events occurring over time with a beginning, a middle, and an end; (2) retrospective interpretations from a particular perspective; (3) focused on human intention and action; (4) part of the process of constructing identity (the self in relation to others); and co-authored by narrator and audience.

A number of these elements can be drawn together defining narratives as:

about people (characters) who act (events) in space and time; typically across a sequence of events (temporality). The narrative form (structure) is the said to hold the content together (what the story is about – its plot) and sequentially arrange the story units (orientation, complication, resolution, closure) into a more or less coherent whole. (Bamberg 2012)

When viewed in this way, narratives available for study are not just limited to life stories and material from extended interviews. There is a wide range of opportunities to examine narratives in various naturally occurring settings as well as collecting them specifically for research purposes through interviews (Atkinson and Delamont 2006).

Having collected narrative material there are a myriad of ways in which this material can be analysed. For instance, attention can be given to the structure, the language used or the way in which narrators position themselves and others. Analytic choices made at this point and questions posed both influence whether a particular piece of research would be classified as narrative inquiry.

Narrative analysts interrogate intention and language – how and why incidents are storied, not simply the content to which the language refers. For whom was this story constructed, and for what purpose? Why is the succession of events configured this way? What cultural resources does the story draw on, or take for granted? ...What does the story accomplish? (Riessmann 2008:11)
This approach relies on preserving extended accounts and treating them as analytic units rather than fragmenting accounts though use of thematic categories commonly used in other forms of qualitative research (Riessmann 2008).

With the complexity involved in narrative analysis, it difficult to focus on a range of narrative practices simultaneously. This makes the practice of ‘analytical bracketing’ useful in facilitating a focus on one aspect of narrative practice (for example how the story is being told) while temporarily deferring concern about what is being told (Gubrium and Holstein 1998).

Have completed a narrative analysis what knowledge claims can be made? Narrative inquiry of the past few decades has focussed on how stories are told rather than discovering ‘truth’ in the data. Since the 1980s there has been marked by a shift from realism to narrativity. In the reading of narrative accounts, attention is now given to the process, product and consequences of reportage itself, not just to the scenes being described (Rosenwald and Ochberg 1992).

In analysing interpretive practice we do not aim to derive the real – ‘their world’ or ‘their story’ … Rather our goal is to make visible how practitioners of everyday life constitute, reproduce, redesign or specify locally. What the institutional and cultural contexts of their action make available to them (Gubrium and Holstein 1997: 115).

Greater consideration is given to the constructed nature of the social world and the multiplicity of experiential realities that might be created. For example:

For any inquiry into one’s own practice there are many possible stories to tell. For every story that is told, there are many possible meanings to interpret. Stories about practice are not mirrors of experience; like all texts, they are constructed by the author with certain intentions in mind (Lampert 2000: 68).

A further consideration for narrative researchers is attending to the way stories of experience are embedded within social, cultural, linguistic and institutional narratives (Clandinin 2013). Narrative inquiry must always extend beyond the personal and attend to the social and cultural context in which stories are told.

Having conducted narrative analysis, it is necessary to have a means to evaluate the quality of the research. Questions of validity, reliability, and generalisability lack relevance in the context of narrative inquiry. Validity addresses the concern of whether accounts are ‘accurate’ or ‘valid’ representations of reality. This may be relevant if one is taking a realist perspective. However, taking the view that multiple realities exist and that data reflect the researcher’s and the participant’s mutual constructions, concerns of ‘truthfulness’ and ‘validity’ are replaced by concerns with communicated situated experiential realities. As Holstein and Gubrium (1995: 9) state,

The validity of answers derives not from their correspondence to meanings held within the respondent but from their ability to convey situated experiential realities in terms that are locally comprehensible. Do they resonate in the context in which they were produced?

Reliability, in the traditional use of the term, looks at consistency across repeated investigations, in different circumstances and with different investigators. However, in narrative research, it cannot be expected that answers on one occasion will replicate those on another because they emerge from different circumstances of production (Holstein and Gubrium 1995). This is considered one of the strengths of narrative inquiry.

Generalisability refers to the claim that results can be projected to a wide range of specified circumstances beyond those studied in the research. A focus on generalisability would diminish the value of the local and particular, a key aim and strength of narrative work. The lack of relevance of traditional concepts, such as
validity, reliability and generalisability, does not mean that all narrative studies are judged to be of equivalent quality and that standards cannot be set for narrative research.

A set or principles that we have found useful (drawing on Garman 1996) are set out below. 

Verité: Does the work ring true in terms of consistency with accepted knowledge in the field? Or if it departs, does it address why? 

Integrity: Is the work structurally sound? Does it hang together? Is the research rationale logical, appropriate and identifiable with an inquiry tradition? 

Rigour: Is there sufficient depth of intellect, rather than superficial or simplistic reasoning? 

Utility: Is the work useful and professionally relevant? Does it make a contribution to the field? 

Vitality: Is it important and meaningful? Do metaphors, image, visual communicate powerfully? 

Ethics: Is there evidence that privacy and dignity have been afforded all participants? 

Verisimilitude: Does the work represent human experiences with sufficient detail so that the portrayals can be recognisable as ‘truly conceivable experience’. Does this research render accounts that readers not only read but feel and believe?

We turn now to the study of a particular case of an emerging organisation making use of a narrative strategy (either knowingly or intuitively) to mobilise a group of stakeholders to engage in collaborative branding activity.

4. Using narrative inquiry to explore collaborative branding activity

To set the scene for this narrative analysis we first discuss two studies that promote the use of a narrative lens to study organisational innovation and the acquisition of capital by entrepreneurial firms from external sources. In a recent study on the role of narratives in sustaining organisational innovation, Bartel and Garud (2009) propose that while designs and processes are necessary for innovation to occur they may not be sufficient. They argue that innovation narratives are key cultural mechanisms that facilitate the productive social interactions needed in the implementation of organisational designs and processes. One of the key aspects in this coordination is the translation of ideas throughout the organisation so that they are comprehensible and appear legitimate to various stakeholders. They also highlight the need for both coherence and flexibility in narratives. They point out that narratives are especially instrumental in socialising newcomers and creating a common ground of social action within organisations. Also that narratives enhance social interactions by presenting information, ideas or practices in a manner that is evocative.

In a similar vein but a different context, Martens, Jennings and Jennings (2007) in their study of entrepreneurial narratives, argue that story telling is influential to a firm’s ability to secure finance from external sources. Obtaining adequate capital is vital for survival and growth but it is widely recognised as a complex and challenging task. A particular challenge for entrepreneurial firms is that in their early stages of development they lack a track record and require potential funding parties to make a leap of faith with limited information and uncertainty about the value of the firm’s entrepreneurial opportunities and their capacity to exploit them.

Martens et al. (2007) identify the three ways in which narratives can work towards enhancing resource acquisition for entrepreneurial organisations. Firstly, by communicating identity that is comprehensive and memorable. Second, by communicating current and intended actions, making sense in an ambiguous situation and communicating insights. Finally, they argue that interest in the activities of the company and commitment to financially supporting those activities are enhanced by narrative work.

Narrative scholars argue that successful stories don’t just provide inform readers; they generate interest and commitment, thereby motivating audience members to act in a manner consistent with the author’s intended outcomes Martens et al. (2007:117).

In summary narratives for emergent organisations provide a means to: (1) communicate in a rich and evocative way a coherent story about the organisation - constructing its identity and making more tangible the
opportunities it is developing; (2) create a sense of common ground with internal and/or external stakeholders and; (3) work towards reducing the ambiguity and complexity around the circumstances of the organisation.

In the coming section we demonstrate the use of a narrative approach to help understand and enhance the practice of collaborative branding activities and cross-sector partnership development more broadly.

4.1 Background to the ‘Brand Orange’ Case study

Our work on this research study has its origins in practice. Launched in January 2006, the Brand Orange project was funded for an initial three-year period by state and local government and by the Orange Region Vignerons Association. An Executive Officer was appointed and in consultation with a diverse group of private sector stakeholders, work began on establishing an umbrella brand for the marketing, promotion and development of the Orange region based primarily on wine and food tourism. Orange is a regional Australian city with a population of around 40,000, located three hours west of Sydney.

We first came across the story of ‘Brand Orange’ in 2008 when undertaking research on local farmers’ markets. Looking at the Orange Farmer’s Market website we found links to a wealth of documents about a local collaborative food and wine marketing initiative that linked state and local government funding to local food and wine producers under the umbrella group of Brand Orange. What grabbed our attention about this place branding collaborative partnership were the sheer volume, diversity and richness of documents accessible from the Brand Orange website and local government websites. These documents include Brand Orange newsletters to stakeholders, local government documents, presentations outlining the branding approach, membership prospectuses, media releases, news and lifestyle articles. Most interesting were three newsletters (each ranging from 12-16 pages) written by the Executive Officer at various points across the initial three years of the project.

Reading the newsletters we felt that we were stepping back in time and experiencing part of how this not-for-profit organisation had emerged. Brand Orange – which later became known as ‘Taste Orange’ – was lauded as a success story that the state government felt worthy of replication in other regional areas. At the end of the first two years of the project, recognition of the district’s reputation as a wine tourism destination moved from 42nd to the top 8 in Australia (Taste Orange 2008). According to the Executive Officer of Brand Orange monthly visits to the region showed a 500% increase across the 3rd and subsequent year of the project, that is, December 2007 – December 2009 (Currie 2009).

The stated aim of this place branding project was to continue building an integrated wine/food tourism industry by increasing awareness of the ‘Orange’ regional brand, increasing visitor numbers and lifting visitor expenditure. There was a focus on achieving greater recognition and opportunities for local wines, delivering more of these wines into urban markets and consolidating Orange’s reputation as a place that offered great wine and food.

Our key focus in our narrative analysis is on the establishment phase of the branding project and our analysis concentrates on three newsletters published over the first two years of Brand Orange project. We read these three newsletters as a narrative, producing coherence and continuity to this developing cross-sector partnership.

4.2 Research design

In examining the Brand Orange project we have characterised the organisation as a cross-sector partnership. Cross-sector partnerships involve diverse stakeholders from public and private sectors and experience significant challenges in mobilising these diverse partners to act collaboratively to achieve collective outcomes (Koschmann, Kuhn, and Pfarrer 2012). In tourism and destination marketing cross-sector partnerships are
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common bringing together various levels of government along with diverse range of businesses in the tourism and the hospitality industries.

Examining this emerging cross-sector partnership through a narrative lens includes a focus on: (1) how work is enacted through narrative to retrospectively account for what has been done; (2) how identity work is done; and (3) how complexity and ambiguity are addressed by presenting a cohesive narrative around the project and imagining a future for the project. The process of documentation renders particular aspects of marketing work more visible.

The use of documents provides an alternative data source to the more commonly used interviews in case study research. Documents published during the time of interest illustrate the phenomena in its real-time context (Yin 2003) rather than the retrospective accounts that generally characterize interview data where accounts can be compromised by memory loss and rationalisation (Dahlin, Fors and Öberg 2006). In analysing the three newsletters we are not looking at narrative as a transparent representation of what went on and why. Rather, our attention is directed to the way in which a narrative strategy has been used (consciously or unconsciously) to mobilise a diverse group of members to act in ways to their collective benefit during the emergence and development of this organisation. No attempt is being made to project findings from this case to a general population. Yet we would argue that the findings of this study are transferable more broadly to cross sector partnerships and place branding initiatives.

The particular case selected for examination – ‘Brand Orange’ was chosen for two key reasons: (1) the organisation has been recognized for its success in meeting the objectives of its branding initiative and as a model for other regional areas i.e. it can be considered an exemplar; and (2) a large volume of documents (approximately 50) relating to the branding initiative are publically available online. This provides an extensive data source on the project. The data covers a time period of three years so gives a longitudinal perspective to the analysis. This temporal aspect to the data is critical when considering the process of the development of the initiative. From the 50 available documents we selected the three information rich newsletters for intensive analysis. These documents were well suited to addressing the research question. A timeline for the Brand Orange project from 2006-2008 is presented in Figure 1. Dates of each newsletter and milestones for the project are highlighted.

Figure 1: Brand Orange timeline 2006 to 2008
The selection of an exemplar reflects purposeful sampling designed to provide an ‘information rich’ case from which a great deal can be learnt about issues of central importance to the project (Patton 2002). Working with a single case study allows for the development of a ‘rich story’, an aspect often missing when multiple case studies are used (Eisenhardt and Graebner 2007). It is the capacity for illustration rather than any claims to generalisability that is the strength of the single case study approach. As textual analysis involves fine-grained data analysis it recommended that within a data set there should be a focus on only a few texts or parts of texts (Silverman 2003). Thus we have limited our analysis to selected extracts of the three newsletters.

Narrative analysis can take many forms reflecting the research question and the researcher’s theoretical orientation. We could examine the plot constructed across the three newsletters, for instance, as a progressive narrative showing advancement towards a goal (Gergen and Gergen 1997). Or we could look at the discourses that are drawn on in the telling of stories within the newsletters. However given, the limitations of space we will restrict our analysis to the work that is being done in the each of the three newsletters. This approach aligns with the studies discussed earlier. The sections dealing with each newsletter have been named to reflect the aspects of work that appear most critical in that document. Within each of these sections we undertake textual analysis to draw attention to the way language has been used to invoke and mobilise stakeholders. What will be demonstrated is that while the newsletters give an account of the project to the various stakeholders, much more complex work is being undertaken and can be interpreted through careful textual analysis.

An abductive research strategy was adopted with theory and research intimately intertwined (Blaikie 2010). As researchers we have spent alternating periods of immersion in the relevant documents and periods of withdrawal for reflection and analysis of data. Categories have been developed through an iterative process of going back and forth between theoretical concepts and the data (Alvesson and Sköldberg 2009). Our research has been shaped by the specific theoretical positions we have adopted.

5. Narrative analysis of the Brand Orange project

5.1 Phase 1: Foundational work

The first of the newsletters was written at the end of the first year of the project informing members of progress. The document was a 12-page colour document made available electronically and in hard copy. Its stated aim was to ensure that members were kept well informed about the progress of the Brand Orange project, and to provide a forum for discussion and feedback. A key theme that emerged in our analysis was establishing legitimacy both for the project and the project leader. Table 1 displays excerpts to illustrate this work and how it had been enacted. The narrator’s intentions have been interpreted by the researchers through close engagement with these texts and relevant theory. As with any interpretive work other researchers and the newsletter’s author may ascribe alternative intentions.

Emerging organisations need legitimacy in a way that is assumed in existing organisations (Golant and Sillince 2007). For emerging organisations the establishment of legitimacy is important to secure resources and other forms of support. The placement of reporting of progress in the very early stages of the first newsletter suggests a choice has been made that this accounting is needed before further discussion of the project can be introduced. Lists are provided to enhance the sense of completeness and passive voice used to enhance the factual status of the account by removing the presence of the author in this section. Following the account there is justification and contextualising of the critical role of this groundwork as a basis for activities in the coming years. As well as informing members there is an attempt to involve and include members. This is performed through empathy and reassurance that progress is being made. There is also a very clear articulation of the imperative for the organisation to be self-funding by the end of the three-year funding period.
Table 1: Brand Orange phase 1 – Foundational work*

<table>
<thead>
<tr>
<th>Intentions</th>
<th>Practices</th>
<th>Illustrative excerpts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establishing legitimacy</td>
<td>Accounting</td>
<td>It is a year when a lot has been achieved…</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There was a very high level of support expressed for the project progress</td>
</tr>
<tr>
<td>Justifying</td>
<td></td>
<td>This foundation building work during the year places us well for the roll out of our major events in Sydney next year.</td>
</tr>
<tr>
<td>Building connection &amp; community</td>
<td>Reassuring and empathising</td>
<td>It’s a hard year to ask anyone to be patient. But we are now in an excellent position to get down to the really exciting part…</td>
</tr>
<tr>
<td></td>
<td>Recognising contribution to date</td>
<td>2006 involved you … showing vision, commitment and more than a decent dash of trust mixed with optimism and nothing left to lose. 2007 is where you justifiably get to see results</td>
</tr>
<tr>
<td>Articulating a vision</td>
<td>Advocating an entrepreneurial orientation</td>
<td>2008 we need to have been not only successful in delivering to members - we need to be looking down the nose of independence from State funding.</td>
</tr>
</tbody>
</table>

* All excerpts sourced from Brand Orange Newsletter No 1.

These narrative excerpts provide a clear illustration of what Brown, Stacey, and Nandhakumar (2008) call ‘narratives for others’, strategic constructions designed to manage others’ impressions. Accountability can be addressed through the telling of stories that and engage with and render sensible the complexity, ambiguity and unpredictability of organisational life.

5.2 Phase 2: Collaborative work and collective agency

The second newsletter was distributed at the midway point in the project. Given the limited time frame to achieve results from the three year funding commitment there is pressure for decisions to be made and for the ‘collective inertia” often observed in multi-partner projects to be avoided. An important decision to be negotiated with members is the venue for a major event in a large metropolitan area. Detailed analysis of this stage highlights the challenges in deciding at what stage to invite member feedback on the specifics of planned activities. The capacity to direct without appearing to dominate and to marshal consent requires skilful narration. One technique used by the narrator is a repeated series of ‘if’ questions to present the key points of her position in a structured and systematic way, building the weight of her argument in a cumulative manner. Selected excerpts in Table 2 illustrate this.

Table 2: Brand Orange phase 2 – collaborative work and collective agency*

<table>
<thead>
<tr>
<th>Intentions</th>
<th>Practices</th>
<th>Illustrative excerpts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieving collective action</td>
<td>Marshalling consent</td>
<td>If this is our target do we really want ...</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If a target audience has to make a conscious effort....</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If we showcase wine in true partnership..</td>
</tr>
<tr>
<td>Managing conflict</td>
<td>The most acceptable membership is likely to be...</td>
<td></td>
</tr>
<tr>
<td>Maintaining connection &amp; community</td>
<td>Facilitating purposeful social interaction</td>
<td>The usual format is an informal supper followed by a tightly structured hour of reviewing the project to date and prioritising future planning.</td>
</tr>
</tbody>
</table>

* All excerpts sourced from Brand Orange Newsletter No. 2

Following Goffman (1967) this work could be described as ‘face work’ where situations are explained, interactions smoothed and tensions mitigated (Brown et al. 2008). At various points conflict is addressed in an indirect way through vagueness. Vagueness, strategically used, can help consensus with strategic ambiguity providing the space for equivalent rather than shared meanings (Weick and Browning 1986). Attention is given to the social interaction but it is combined with purposeful activity.

5.3 Phase 3 – Identity work: Building a heritage and imagining a sustainable future

The final newsletter has a celebratory tone acknowledging the success of the endeavour and reflecting on both collective identity and future directions. Table 3 illustrates how identity is partly defined through differentiation from other regions. There is also a very clear trajectory for the organisation.

Table 3: Brand Orange phase 3 – Identity work and imaging the future*

<table>
<thead>
<tr>
<th>Intentions</th>
<th>Practices</th>
<th>Illustrative excerpts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identity work</td>
<td>Defining and differentiating</td>
<td>We are not like any other wine region - we’re young, energetic, spirited, small, boutique, quality, family, community based with the best food industry of any wine region in Australia.</td>
</tr>
<tr>
<td>Imagining the future</td>
<td>Advocating an entrepreneurial trajectory</td>
<td>We have an opportunity in the New Year to prove that we can manage our own destiny, publish credibly, build a solid financial base and expand the services to industry and community in partnership with local government.</td>
</tr>
</tbody>
</table>

* All excerpts sourced from Brand Orange Newsletter No. 3

Identity and narrative are closely linked. Narratives can help bring emergent organisations to life with people constructing, in different ways, meanings and identity from organization events and experiences. Further narratives establish and maintain connections between people who may or may not know each other personally (Rhodes and Brown 2005).

Across the several year time span of the emergence of this collaborative branding activity – ‘Brand Orange’ to ‘Taste Orange’ - we can witness the translating and communicating of ideas and plans in rich and evocative ways that justify and enhance legitimacy of actions to date and lay the groundwork for future plans. Enhancing
and building on this is the socialising of newcomers and creation of a common ground to facilitate collective action. Finally, the narrator uses these newsletters for facilitating the ongoing construction of a coherent conception of identity and intention (Kuhn 2008).

What is evident from the narrative analysis in this study is that collaborative activity in a cross-sector partnership involves much more than getting stakeholders together and working through steps in a linear plan. This analysis has presented a picture of an emerging project in a vivid way that highlights the complex relational and communicative work undertaken in a successful cross-sector partnerships. The extent and nature of this work would not have been evident if a more abstracted and potentially generalisable investigation had been conducted with a large sample size.

6. Concluding comments

We have argued in this paper for the use of a narrative approach for the study of social processes in marketing organisation and illustrated how narrative analysis of an exemplar case can surface tacit knowledge and draw out lessons from practice. A series of practices, accounting, justifying and empathising were identified as important in the development of the emergent Brand Orange project. These findings resonate with Boje’s (1991) contention that being able to perform stories is an underrated yet important management skill that can assist organisation members to make sense of what is going on and effect change. The framing and focus of our study represents just one in a myriad of potential sets of decisions and directions in which this study could have been taken. The particular path selected reflects out concerns, choices and constraints as researchers.

Whilst narrative inquiry affords interesting and varied possibilities is not without its limitations or critiques. Researchers who would be identified as supportive and even influential in narrative research raise three substantial concerns. First, there is concern expressed about research that is labelled narrative – without any systematic narrative inquiry. Atkinson & Delmont (2006) argue passionately for the need to adopt an analytical rather than a celebratory stance on narrative. While they stress the importance of narrative and narrative analysis, all too often they believe “narratives are collected and celebrated in uncritical and analysed fashion” (Atkinson & Delmont 2006:166). Common weaknesses are researchers assuming that informants’ accounts ‘speak for themselves’ and also failing to acknowledge the social and cultural context of accounts given.

A further concern is one raised by Czarniawska (2006) on the differing capacity and interest by people in relation to story telling. She describes her own difficulty/disinterest in constructing her own life story and cites Strawson’s (2004) argument that not everyone may share the compulsion to weave their lives into a coherent study. Some people prefer non-narrative devices such as tables, lists or taxonomies.

Finally, Josselson (2006) highlights the limitations of narrative research in accumulating knowledge. She raises the question of how theory can be advanced without reifying or losing the richness of the narrative basis. One way of responding to this challenge, she suggests is to take similar approach to cross case analysis and work at the conceptual level layering studies, looking for commonalities and difference and helping build support for patterns as a means to go beyond individual studies to larger frameworks of understandings. It is important to note however, that these repeated patterns remain situated and that the understandings generated are only ever provisional.

Common to all these concerns presented is a need to consider and account for the logic that underlies narrative inquiry and the knowledge claims that can be made from rich, local and particular studies of social life. Narrative inquiry has significant scope to contribute to understandings of social (including organisational) life but it needs to be practised in a manner that plays to its strengths rather than its limitations.
Acknowledgements

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Applying Knowledge Cartography Techniques and Tools to Facilitate the Process of Realist Synthesis

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Abstract: The astonishing growth of academic publications worldwide and the increasing access to online bibliographic databases of recent decades represent a challenge to researchers and professionals concerning the integration of findings on their area of expertise. As management studies multiply the importance of using new methods of qualitative research synthesis increases. New methods of qualitative synthesis have been recently developed, such as qualitative meta-synthesis and realist synthesis (or realist review). Yet, these qualitative synthesis methods remain relatively unknown by management researchers. Objectives - The purpose of this paper is to briefly present the realist synthesis method, and to show how knowledge cartography techniques and tools can be used in realist synthesis in order facilitate the process of theory building. Design/methodology - Underpinnings and method of realist synthesis are described, followed by a discussion on knowledge cartography and its applications to qualitative research. A realist synthesis on collaborative teaching serves as an illustration of how knowledge mapping tools can facilitate the realist review process. Findings – Cartographic techniques and tools can facilitate organizing and analysing studies, arranging and re-arranging concepts and, thus, can help designing theoretical frameworks in realist reviews. Originality/value – This paper can contribute to the instrumentalization of the realist review method, and to disseminate this method of research synthesis in Management Research.

Keywords: qualitative research synthesis, realist synthesis, knowledge cartography, knowledge maps

1. Introduction

Science is a cooperative and cumulative endeavour. Knowledge building in any field requires trustworthy accounts of past research. But making sense of a growing mass of research evidence is getting progressively harder with the astonishing growth of scientific publications worldwide and with the increasing access to online bibliographic databases of recent decades, available through the Internet. This represents a challenge to researchers and professionals concerned with the integration of findings in their area of expertise (Cooper 1998).

In this scenario, research syntheses have been playing an important role. A research synthesis can be defined as the systematic effort of finding, selecting, organizing, evaluating and integrating research findings on a given topic. According to the Handbook of Research Synthesis (Cooper et al. 2009), until the 1960s, most syntheses were written on an essayistic or narrative fashion. Those traditional literature reviews frequently suffered from researcher bias and lack of rigour, and, in many cases, were not considered as genuine pieces of scientific investigation. On the 1970s, standardized protocols of literature review were developed in order to provide increased reliability and consistency in synthesising research findings. Such systematic and meta-analytic reviews became popular during the 1980s and 1990s, especially in medicine and in social sciences, fostered by institutional initiatives such as the one from EPPI Centre, (http://eppi.ioe.ac.uk/), and by cooperative networks such as Cochrane Collaboration (www.cochrane.org) and Campbell Collaboration (www.campbellcollaboration.org) (Crag 1996, Littel et al. 2008).

Despite these developments, most research syntheses tended to focus on quantitative studies. According to Sandelowski et al. (1997:365) the increasing dissemination and refinement of quantitative methods of research synthesis contrasts enormously with the little attention given to qualitative research synthesis. As a
result, findings of qualitative studies end up getting scattered or lost, and end up having little impact on professional practices and policies (Matheus 2009).

In the past decade, new methods of qualitative synthesis have been disseminated, such as qualitative meta-synthesis (Sandelowski et al. 1997) and realist synthesis (or realist review) (Pawson et al. 2004). These methods are still very young and relatively unknown to the wider public of social science researchers.

With the increasing number of qualitative studies in management, it is important to apply these new methods to synthesise findings that, otherwise, would remain dispersed, and, therefore, be able to provide researchers and practitioners with useful information to guide future research or foster evidence-based policies and practices in the field.

The present work aims to be a contribution, not only to the dissemination of the realist synthesis method within the field of management research, but also to its development, by showing how knowledge cartography techniques and tools can be applied in order facilitate the process of theory building within this method. First, we present the main ideas underlying realist synthesis, and briefly describe its process. Then we describe what knowledge cartography is and how it can be useful for research and, particularly, for literature reviews and research synthesis. Finally, using a realist synthesis on collaborative teaching as an illustration, we show how knowledge maps can be used to facilitate some tasks of the realist synthesis method.

2. Background

2.1 Realist synthesis

Realist synthesis (or realist review) is a kind of qualitative research synthesis with the interpretive and explanatory purpose of understanding the processes or mechanisms underlying complex social interventions. In short, it aims to provide explanations of how and why such interventions work (or not) in a given context by creating a theoretical framework or model to be “populated” with empirical evidences drawn out from selected studies. This approach was developed by Ray Pawson (University of Leeds), Trisha Greenhalgh (University College London), Gill Harvey and Kieran Walshe (both from Manchester Centre for Healthcare Management) at the ESRC UK Centre for Evidence Policy and Practice. The present section summarizes the main ideas that support this approach as discussed by Pawson et al. (2004) and Pawson (2006).

The notion of complex social intervention is key to realist synthesis. A social intervention is considered to be of increasing complexity as it involves a growing number of processes or mechanisms which are interdependent and intertwined with contextual variables (environmental, historical, political, social, economic, institutional, etc.). The effectiveness of simpler interventions or treatments – such as the testing of a new drug in a given population – can be evaluated by synthesizing the results of a group of studies, selected based on their similarity and methodological rigour. This is usually done by following systematic reviews and/or meta-analytic protocols, often leading to quantitative comparisons and/or sum up of ‘effect sizes’. In contrast, when trying to appraise the effectiveness of a complex social intervention – such as a mentoring programme for developing leadership skills of employees from a company –, these methods tend to be much limited and even problematic. According to Pawson et al. (2004:iv), attempts to measure whether such interventions work using such protocols will always end up with the homogenised answer ‘to some extent’ and ‘sometimes’, but this is little of use to policy makers or practitioners because it provides no clue as to why interventions sometimes work and sometimes don’t or in what circumstances or conditions they are more or less likely to work or what can be done to maximise their chances of success and minimise the risk of failure.

This happens because, on the one hand, complex social interventions involve actions made by people according to their personal intentions, motivations, theories (knowledge and interpretations), values and beliefs of what has to be done in order to succeed. This actions are interdependent, embedded in multiple social systems (groups, institutions, cultures etc.), and form open non linear “living” chains of steps or
processes, i.e., prone to change as they are implemented due to internal and external influences from multiple stakeholders who impose pressures, limits, negotiations, and even redirect the course of action. Thinking on the example of a leadership skills mentoring programme, we must find that it may succeed in organization A, fail in organization B, and bring unexpected results in organization C. A close comparison of these three versions of the programme could reveal the richness and complexity of these interactions.

On the other hand, to allow rigorous quantitative comparisons among a set of replica studies, meta-analytic procedures lead to simplification and obfuscation (Pawson 2006:42). Studies are discarded, programme complexities are reduced to simple treatments, details and contextual information is ignored or circumscribed by a given set of categories. Pawson’s critique of meta-analytic approach applied to synthesize evidences from studies dealing with complex social interventions can be summarized as follows:

The effort to ensure that evidence is assessed and compared to a common yardstick renders dynamic open systems as closed systems. Because it works at high levels of aggregation, because there is so little inspection of what goes on beneath the surface, and because programmes always contain wayward, contradictory, self-transforming processes, meta-analytic usually ends with the detection of rather minor intervention effects. The typical product is in fact meta-equivocation (Pawson 2006:43).

Therefore, a realist synthesis takes a different approach. Instead of seeking for universal principles or a final verdict about the intervention (effective vs. ineffective), realist synthesis recognizes the fact that the success of an intervention depends on complex interactions, negotiations and conflicts between individuals, relationships, institutions and infrastructures through whom and for whom the intervention is directed. So it seeks to answer what works, for whom, in what circumstances, in what respects, and how (Pawson et al. 2004:v).

This is done by searching for pieces of concepts, models, explicit or implicit theories allegedly responsible for the operation of a particular intervention; building a theoretical model or framework out from these pieces (or based on them), and look for pieces of evidence in a systematic way to test and refine the understanding of the relations among these elements. The ultimate goal is to provide input for the design of new interventions, programmes or policies. The review seeks to synthesize findings in terms of a theory of intervention built from a “mosaic” of evidence-based principles and concepts extracted from selected studies. Final conclusions should be capable of expressing the complexity and dynamicity of the intervention, program or policy under study, and recommendations should be given with care and being transparent about the review limitations: “’remember A’, ‘beware of B’, ‘take care of C’, ’D can result in both E and F’, ‘Gs and Hs are likely to interpret I quite differently’, ’if you try J make sure that K, L and M have also been considered ... ‘little is known about V, W, X, Y and Z’” (Pawson et al. 2004:27).

The review method follows a sequence of steps, but instead of a fixed linear sequence, it is an iterative/recursive process, i.e., allowing revisions and refinements of previous steps, even when the review is well further. A generic template for realist reviews proposed by Pawson et al. (2004:29) is shown in table 1. This template should not be interpreted as a rigid scheme. What matters is to keep the logic and transparency in the process of discovery and theory building and refinement (2006:102).

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1 For a much detailed portrait of the complex nature of social interventions see Pawson 2006:26-37.
<table>
<thead>
<tr>
<th>STEPS</th>
<th>TASKS / GUIDING QUESTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define the scope of the review</td>
<td>1. Identify the question • What is the nature and content of the intervention? • What are the circumstances or context for its use? • What are the policy intentions or objectives? • What are the nature and form of its outcomes or impacts? • Undertake exploratory searches to inform discussion with review commissioners/decision makers.</td>
</tr>
<tr>
<td>2. Clarify the purpose(s) of the review</td>
<td>• Theory integrity – does the intervention work as predicted? • Theory adjudication – which theories about the intervention seem to fit best? • Comparison – how does the intervention work in different settings, for different groups? • Reality testing – how does the policy intent of the intervention translate into practice?</td>
</tr>
<tr>
<td>3. Find and articulate the programme theories</td>
<td>• Search for relevant theories in the literature • Draw up ‘long list’ of programme theories • Group, categorise or synthesise theories • Design a theoretically based evaluative framework to be ‘populated’ with evidence</td>
</tr>
<tr>
<td>4. Search for the evidence</td>
<td>• Decide and define purposive sampling strategy • Define search sources, terms and methods to be used (including cited reference searching) • Set the thresholds for stopping searching at saturation</td>
</tr>
<tr>
<td>5. Appraise the evidence</td>
<td>• Test relevance – does the research address the theory under test? • Test rigour – does the research support the conclusions drawn from it by the researchers or the reviewers?</td>
</tr>
<tr>
<td>6. Extract the results</td>
<td>• Develop data extraction forms or templates • Extract data to populate the evaluative framework with evidence</td>
</tr>
<tr>
<td>7. Synthesise findings</td>
<td>• Compare and contrast findings from different studies • Use findings from studies to address purpose(s) of review • Seek both confirmatory and contradictory findings • Refine programme theories in the light of evidence</td>
</tr>
<tr>
<td>Draw conclusions and make recommendations</td>
<td>• Involve commissioners/decision makers in review of findings • Draft and test out recommendations and conclusions based on findings with key stakeholders • Disseminate review with findings, conclusions and recommendations</td>
</tr>
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Table 1: The process of a realist review (adapted from: Pawson et al. 2004:29)
The review begins by setting goals and questions that will guide the process. If the goal is to evaluate the integrity of a theory of intervention, the reviewer will seek to identify weaknesses and barriers in the chain of processes of the intervention in a story of successive similar interventions. If the aim is to evaluate rival theories of intervention, the reviewer will try to synthesize the evidence in favour of one or another theory and explanation of the mechanisms, benefits and shortcomings of each. If the objective is to analyze how the same theory of intervention is implemented in different contexts, the reviewer will try to identify factors that best explain this or that situation. If the target is to compare official expectations and current practices, the review will look for elements of reality that are being neglected or contradict official expectations, knowledge and beliefs. The goal and question setting should remain open to revision and refinement along the way.

Searching for references is similar to what happens in systematic reviews: it is necessary to define sources, search expressions, inclusion/exclusion criteria, and quality standards for selecting studies. However, there are some points of differentiation: searching the literature can be done at different moments and for different purposes: a first exploratory search can help the reviewer to get familiarized with the topic, a second search may focus in identifying and extracting relevant programme theories, a third “purposive sampling” search can focus on finding empirical evidences to “fill up” or “test” the model, further searches can be done in order to refine the model; while systematic reviews progressively narrow down the number of references, by applying selection criteria, search strategies in realistic revisions may involve several cycles of narrowing down the scope, followed by scope expansions in another direction towards retrieving “convenience samples” of studies (purposive sampling). This is done in order to investigate specific aspects of the intervention in focus. Thus, the universe of selected references may suffer expansions and contractions along the route. Distinct niches literature can be scrutinized. These strategies are applied recursively until the reviewer identifies a saturation point, where new studies no longer add significant information to the synthesis.

Experimental studies, case studies, ethnographic research, theoretical discussions and other types of research can be included. It is important to mention that quantitative studies also may be used. But in this case, the reviewer will not be looking for pieces of quantitative data (correlations, effect sizes, p-values, significance levels, coefficients, etc.) to summarize. Instead, he will be searching for pieces of “programme theories” in order to build the theoretical framework. Both quantitative and qualitative data can be “extracted” from certain studies to “fill up” this framework. Different from systematic reviews and meta-analyses, the criteria of selection and quality evaluation are not necessarily the same to all studies. They are established ad hoc. Instead of establishing an absolute filter to separate all usable studies, different filters are used to check the partial contributions of each study to the review questions. In later stages, partial assessments can be made on the relevant information to be extracted. On the other hand, some studies selected for in-depth analysis can be assessed more comprehensively. This “just-in-time assessment” makes the process considerably more complex and time-consuming. Pawson (2006) warns about the limitations of this strategy in terms of the amount of studies that the reviewer is able to encompass. Given the inherent complexity of interventions and their variability, it is necessary that the reviewer prioritize certain contexts and certain sources of information in order to limit the amount of data to a manageable volume. All these decisions should be explicit and justified in the final report.

One of the major challenges of the review process is to “find and articulate programme theories” (step 3 in table 1). A “programme theory” is not necessarily a formal scientific theory, model or set of principles. It can be a conjecture, hypothesis, explanation or rationalization about what works (or not) in a certain part of the intervention chain, and how and why it works (or not). Programme theories are not always explicit, and can be found in different parts of a study (background, methodology, discussion etc.), and not only in the results and conclusions, as it is done in other types of research synthesis. Theories can also differ in terms of: scope, ranging from macro (whole society), to meso (organizations or groups) or to micro level (individuals); level of generalization, from universal concepts, principles and models, to local theories, valid within a specific context. The challenge is not only to identify those theories, but also to prioritise which ones are to be selected, investigated and articulated to each other (Pawson et al. 2004).
2.2 Knowledge cartography

Knowledge cartography is the art, craft and science of mapping cognitive domains. Knowledge maps – sometimes called cognitive maps – are graphical representations of knowledge structures (concepts and relations between them). According Jonassen et al. (1993), cognitive maps serve both to access and analyze the cognitive structure of its author, and to present information in a schematic way, assist in the organization of content, facilitate its representation, visualization, communication and understanding.

There are different types of knowledge maps, each one better suit for specific applications: mind maps are useful for brainstorming ideas, problem-solving and creative writing (Buzan 1991); concept maps are suitable to represent knowledge domains or cognitive structures, by making concept relations and hierarchies explicit (Novak and Cañas 2006); argument maps are meant to visually represent the components of an argument, such as main contention, principles, premises, co-premises, objections and rebuttals, that can be applied to decision-making, legal and political analysis (Okada 2008); hypermedia maps and web maps are graphical and hypertextual representations of knowledge domains which incorporate different digital media files (texts, images, audios, videos etc.), software and/or web links (Okada 2007, 2008, Tractenberg et al. 2009).

While mind maps usually have a radial-branching structure, concept maps have a more strict representation in terms of hierarchy, putting higher-order concepts on the top, over subordinated concepts, and links between concepts must identify the nature of their relation. Argument maps should clearly identify issues, arguments or questions, pros and cons, premises, counterarguments, and conclusions. Hypermedia and web maps have a free hypertextual structure that can hold different kinds of knowledge maps and digital media. These kinds of maps can be very useful for indexing and retrieving hypermedia information (Gaines and Shaw, 1995).

Okada (2008) described seven types of knowledge maps that can be used useful in a research process: a research project map can help with defining research problems, questions and objectives, and, thus, building a research project; a map of references can support the indexing and organization of a literature review, and also easily retrieving research documents; a map of reading can help the researcher with the process of describing, analysing, synthesizing and/or interpreting studies; a map of concepts can be useful for building a conceptual framework of each study or a set of studies; a map of field research can help with organizing and analyzing fieldwork data (notes, documents, observations etc.); a map of writing can help the researcher in the process of systematizing and writing his research report; and, finally, a map of research process can be used to keep track and manage the investigation as a whole.

Maps of references, maps of readings and maps of concepts can be of special interest to researchers conducting literature reviews and research synthesis. As put by Vasconcellos,

> Mapping ideas, arguments and concepts of a body of literature are important techniques for literature reviews. Mapping allows the researcher to find his way into a set of the existing literature, identify key studies and key concepts, and, at the same time, build up a framework of relationships between each study. (2008:170)

The next section will discuss how knowledge cartography techniques and tools can be embedded in the method of realist synthesis to help with the process of mapping programme theories.

3. Discussion: applying knowledge cartography techniques to facilitate the process of realist synthesys

The tasks of searching for relevant theories in the literature, selecting, listing, grouping, categorising, synthesising programme theories in order to build a theoretical framework form step 3 of the template of a realist review (see table 1: ‘Find and articulate the programme theories’). As mentioned previously, this step is one of the major challenges of the entire process of a realist synthesis. Pawson et al. point out that “reviews may spend half of their time in the conceptual quagmire” (2004:18). The authors advise reviewers to temporarily
adopt a ‘primary research’ rather than ‘synthesis’ role, and scavenge ideas from a number of studies to produce a long list of key intervention theories from which the final short list will be drawn up. (2004:16)

Considering that the final ‘product’ from step 3 is a model or theoretical framework, i.e., a set of interrelated concepts, principles and/or variables, representing the rationale of how and why an intervention works; and considering the benefits of knowledge cartography in representing knowledge structures, we wondered if building maps of references, maps of readings and maps of concepts of the relevant studies could be a valuable strategy to help the reviewers succeed on this step.

So we decided to test this idea on a realist synthesis on collaborative teaching in higher education we started in 2013. Before showing how we used the maps, it is necessary to give a few words on the nature and context of the intervention, and on the purpose of our realist review.

Teamwork and collaboration are substantive ideas in post-fordist organizations. Virtues of collaboration are constantly extolled in management articles and business magazines. Yet, forging an authentic and sustainable collaboration culture within the organization is not an easy process. This is particularly true in educational institutions that commonly reinforce isolation, individualism and balkanized forms of collaboration among teachers (Fullan and Hargreaves 2000). Collaborative teaching, our intervention in focus, is a form of teacher collaboration in which two or more teachers work together in planning, development, evaluation, and especially in the implementation of instructional activities directed to the same group of students. Different forms of collaborative teaching, such as team teaching, co-teaching and shared teaching have been studied and practiced since the 50s. Most literature reviews on the topic point to a growing cumulative evidence suggesting that collaborative teaching can contribute to interdisciplinary education, to initial and continuing professional development of teachers, and to reinforce teacher collegiality.

In our own systematic review on collaborative teaching in higher education settings (Tractenberg 2012), we found relatively few studies dedicated to discuss processes and mechanisms underlying such kind of intervention, but no one presented a more encompassing theoretical model or framework. So we decided to do a realist synthesis in order to try to build such framework out from the literature.

In order to build the maps we used a software tool designed for hypermedia mapping called Compendium, developed by the Open University (UK)².

We initially created a map of references with the articles found in our systematic review (see figure 1). This was a simple list of full-text articles in PDF format organized alphabetically and in columns.

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² See: [http://compendium.open.ac.uk/institute/](http://compendium.open.ac.uk/institute/)
Then we created the maps of readings, taking each relevant reference and analysing it in terms of research problems, hypothesis and objectives, background ideas, research methods and instruments, results and conclusions, and other elements relevant to the review. Figure 2 shows an example of the analysis of an article – BARRON 2002 “Problem-solving and EAP” (English for Academic Purposes). The structure of these maps took the form of a simple mind map where each node contained annotations – figure 2 shows our comments concerning the node “background to research”. As most hypermedia mapping software, Compendium allows multiple windows to be open, so this makes easy to examine two or more maps and its nodes simultaneously.

It is worth to mention that creating maps of readings can take a huge amount of time, so it should be done only with the studies previously scrutinized and found relevant for the review. Despite of the amount of work, this in depth analysis can be very useful to the reviewer. The exercise of identifying and reflecting on the many elements of each study can enhance his awareness of the differences among studies, in terms of rationale, research designs, subject characteristics, contextual differences and unfolding of each intervention. This can be especially useful when the purpose of the review is to understand how does the intervention work on different settings or which mechanisms work similarly in different versions of the programme. Further on, it can facilitate the process of identifying and extracting empirical evidence, and appraising quality of the study (steps 5 and 6 of the review template in table 1).
Finally, instead of drawing up a “long list” of theories, as Pawson et al. 2004 prescribe, we began building a *map of concepts* of each study we find theoretically relevant.

Figure 3 shows a map of some concepts from that study from Barron’s article already mentioned. Beforehand, we invite the reader to “read” this map and understand the author’s argumentation. This map took shape of a mix between a concept and an argument map in order to highlight concept relations and hierarchies, arguments, premises, counterarguments and conclusions extracted from the text.

First, we note the author differentiates a ‘static view’ of teacher collaboration from a ‘dynamic view’. According to Barron, the ‘static view’ is most frequently present in the literature. It sees collaboration (or cooperation) as a matter of quantity (or intensity, or degree), a behaviour characterised by informal trade-offs, negotiations, attempts to establish reciprocity, and so on. The degree of involvement can range from 0% to...
100% (from none, to informant, to consultant, to collaborator, and finally to colleague). This ‘static view’ does not focus on subjective differences, such as differences in teachers’ philosophical backgrounds, and under-represents the developmental nature of collaboration (Barron 2002:303). According to the author, this vision is poor to explain failures in collaboration when there are philosophical differences among teachers and refusal to address them in a symmetrical way. He argues and that, if we just understand the collaborative process just in terms of degree of negotiations and trade-offs, we might fail to understand collaborative teaching in depth.

On the other hand, he points to a ‘dynamic view’ of teacher collaboration, which considers it an ongoing (or emergent) process of recognizing and exploring different viewpoints, and trying to go beyond them. In order to succeed, each teacher needs to recognize these differences in knowing and perceiving the problem domain, and in ways of solving problems. They need to embrace interdependency, collective responsibility and ownership of decisions, and try to deal with their differences in a constructive way. These issues were raised by the author when analysing why a collaboration experience between English teachers and science teachers did not succeed as intended (they had to work together on the planning and delivery of a course to develop students’ English communication skills, problem-solving and information technology skills).

Note that there is more information on the above explanation that there is on the map. It is information we ‘unpack’ when reading it, together with information withdrawn from the respective map of readings. At this point, it is important to keep in mind that a map of concepts is not ‘primary data’ extracted from the article. Although it should be anchored on the ideas presented by the author, and present a reliable description of them, it is always a snap of interpretations made by the reviewer when creating the map, and when reading it afterwards. In this sense, a realist synthesis is not an objective and neutral abridgement process, but rather an interpretative and creative one, as is normally the case of most qualitative research. It is also important to note that the map shows just some of the ideas discussed by the author in his empirical case study. It is worth to remember that, different from what happens in quantitative research synthesis, we are not looking for summing up results related to the effectiveness of interventions, but for theoretical pieces of collaborative teaching mechanisms.

It is during the creation process of each map of concepts when the use of a hypermedia mapping software proves more useful. Compared to textual summaries or descriptions such as the one made above, hypermedia maps offer more flexibility to the reviewer: searching, rewriting, adding, deleting, coping, pasting, moving and mixing different elements and relationships is much easier. It also can facilitate the tasks of grouping, categorising and combining ideas, towards the creation of ‘higher order’ or ‘integrative’ maps that ultimately will help building the theoretically framework, the final product of step 3 of the realist synthesis template (see table 1).

Undoubtedly, the task of combining maps and building the framework is the most creative challenge of the whole synthesis. There is no recipe or easy way of doing that. And it is practically impossible not to lose information in this process. But the reviewer must be especially careful with trying to preserve differences (of concepts, subjects, contexts, situations, etc.), otherwise the synthesis can fall the same problem of oversimplification and obfuscation found in the meta-analytic approach (Pawson 2006). For example, Barron’s study does not stress differences between the notions of collaboration and cooperation. Other authors do. It would be a mistake to simply mix different notions, without any reservation. It would also be a mistake to mix up different types of collaborative teaching (such as team teaching, parallel teaching, mentoring and so on) without any remark. The same reasoning applies to difference in subjects, situations, relations, etc.

Finally, our example of map of concepts (figure 3) only shows statements, principles and arguments, but the reviewer can start extracting fragments of empirical evidence to illustrate specific relations. This will prove to be most useful further on, during steps 4, 5 and 6 of the review.
4. Conclusion

In the last decade, there has been a growing interest, especially in the United Kingdom and European Union countries, of evidence-based policies and practices (Young et al. 2002). Traditional systematic reviews and meta-analysis have been of great help in summarizing and disseminating research evidences. But, as we pointed out, these methods are not meant to unveil the complexities of underlying mechanisms of social interventions. Management researchers may find realist synthesis a promising method for integrating research in a non-reductionist way. But it is also a very challenging one, especially for “newcomers”. Here we tried to contribute to the instrumentalization of the method by embedding knowledge cartography techniques and tools. Since research synthesis is relatively young, other contributions to the instrumentalization of this method will be very welcome.

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Rediscovering Grounded Theory

When I initially picked up the Barry Gibson and Jan Hartman book my first thought was what a cute name they have come up with for another Grounded Theory book. This initial lack of enthusiasm was further encouraged by the cover of the book which has to my eye a resemblance to the original Glaser and Strauss book of 1967. But this is where my non-positive attitude to the book ended. After an hour of dipping in and out of the book I was completely sold on the proposition that this is an important teaching-learning device.

The Gibson and Hartman book, if indeed we want to call it a book, is excellent and this is the result of the several ways in which they have distinguished their work which some might argue has made it more than a mere book.

But before talking about the structure of their work I need to say that their writing is so accessible. They handle the Grounded Theory jargon in such a way that it does not present a stumbling block for anyone with some background in research. The book unfolds the authors’ narrative in an easy to read way which is a pleasure to follow.

It is the book’s structure that makes it different and so very helpful to both those who are starting out on the Grounded Theory trail and also to those who teach the topic. Besides the fact that each chapter is commenced with a statement of learning outcomes which is useful, the chapters have a number of reflecting activities which range from statements of Critical Reflections, to Questions, to summary Boxes to Skills and Tips sections. A useful list of Boxes and Skills and Tips are supplied. This book is written by two expert tutors.

In addition to its ease of reading and its useful structure the book goes much further than most in helping to understand the nature of Grounded Theory and where its limits might lie. It does this by taking on some of the philosophical issues that underpin grounded theory which few authors have an appetite for. However as well as asking Why is theory so important anyway? I would have liked to have seen the question What is theory anyway? The philosophical discussion is not extensive but it is interesting and useful to kick start this sort of thinking in those who are interested in Grounded Theory. In fact it does this in the introduction before it gets really going with the paraphernalia of Grounded Theory. This prepares the reader to think quite deeply about the nature of the method, what characterises it and how it needs to be undertaken. And shortly there afterwards Gibson and Hartman take on the subject of Constructivist Grounded Theory. This is explained well although I am not at all sure that the term Constructivist Grounded Theory is not profoundly oxymoronic. However as more and more scholars are grappling with the possibility of a non-objectivist or non-positivist Ground Theory approach this discussion is increasingly essential.

Without going into any more detail I would like to say that the thoughts and experiences of the authors are professional delivered in an interesting and well structured text. All the key issues which are require for the successful implementation of a Grounded Theory project are covered.

I highly recommend this book, Rediscovering Grounded Theory, to both scholars and teachers of this topic.

The book can be found at http://sagepublications.com/
It costs £24.99 Paperback and £75.00 Hardcover

Review by Dan Remenyi