



RESEARCHING ORGANIZATIONS

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The Practice of Organizational Fieldwork







Los Angeles | London | New Delhi Singapore | Washington DC

SAGE Publications Ltd 1 Oliver's Yard 55 City Road London EC1Y 1SP

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SAGE Publications Asia-Pacific Pte Ltd 3 Church Street #10-04 Samsung Hub Singapore 049483

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Cover design: Francis Kenney

Typeset by: C&M Digitals (P) Ltd, Chennai, India Printed in Great Britain by Henry Ling Limited at

The Dorset Press, Dorchester, DT1 1HD

© Matthew Jones 2014

First published 2014

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Library of Congress Control Number: 2013946899

British Library Cataloguing in Publication data

A catalogue record for this book is available from

the British Library



ISBN 978-1-4462-5721-0 ISBN 978-1-4462-5722-7 (pbk)

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Preface

The original idea for this book emerged from my experiences in teaching research methods to graduate students, many of whom had just completed an undergraduate degree without having spent much time working in organizations, but who aspired to pursue research in organizational settings to Ph.D. level, and potentially to an academic career. Most of the available research methods textbooks, however, while sometimes very good on techniques of data-gathering (especially via experiments, surveys or occasionally interviews), data analysis (especially of the quantitative variety) and in a few cases on the philosophy, and occasionally ethics, of research, were notably silent on what is actually involved in doing fieldwork in organizations.

Like an instruction manual for a device that omits crucial steps in the process, therefore, or a children's craft programme that moves from the disassembled components to 'here's one that I made beforehand' with only the barest hint of what goes on in between, most methods textbooks tend to focus on abstract description of general principles and final products rather than how research happens in practice. They may therefore be useful, as Bell and Newby (1977: 9) suggest, in providing 'some standard, some set of procedures, some method by which research practice could be evaluated', but they are of limited help in actually doing research, as opposed, say, to planning it or judging its conformance to accepted norms. Despite the observation of Bell and Newby in 1977 that 'it is common knowledge that there is considerable divergence between how sociological research has actually been done and what is found in the textbooks', moreover, little would appear to have changed in the intervening years. Thus Walford (2001: 2) comments:

Many social science and educational research methods textbooks still abstract the researcher from the process of research in the same way as have natural science textbooks. The social dimension of research is largely omitted and the process is presented as an analytic practice where any novice researcher can follow set recipes and obtain predetermined results.

As a supervisor of M.Phil and Ph.D. students conducting largely qualitative studies in a range of organizational settings, moreover, most of whom were more than competent in learning techniques as required, it was precisely this practical aspect of research that many seemed to find the hardest to get to grips

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with. The description given by Gans (1968: 312) of the anxieties of fieldwork, would seem to resonate with their experience (as well as my own at times):

the constant worry about the flow of research activities: Is one doing the right thing at the right time, attending the right meeting, or talking to the right people? ... [the feeling that] one must be in many places at the same time. This being impossible, one must make the right choice of what to study every day, and even so there is always the danger of having missed something and of never being able to retrieve an event that has already become history.

Finding no guidance from textbooks on these issues, however, the students would talk of 'wandering in the dark', 'making it up as I go along' and 'learning the hard way'.

Although to some extent the students' difficulties could be ascribed to the 'craft' character of fieldwork (Punch, 1986), and qualitative research in particular, that means that it can only really be learned through doing it, there was also a sense that it should be possible to provide some information on what organizational fieldwork involves, which might offer guidance and reassurance to those undertaking research in organizations for the first time.

Aware of various 'confessional' methodological appendices in organizational ethnographies such as those of Atkinson (1997), Kunda (1992) and Luke (2003), I therefore started to look for additional fieldwork accounts, as well as any literature that might draw some common threads between these contributions, or offer suggestions on how fieldwork might best be approached. My first discovery was the edited collection Doing Research in Organizations (Bryman, 1988), but I found that this was long out of print. Further investigation revealed some sociological literature, albeit much of it dated, such as Wax (1971), Johnson (1975) and the edited collections of Hammond (1964), Bell and Newby (1977) and a range of articles in specialist research methods journals, such as Journal of Contemporary Ethnography and Qualitative Research in Organizations and Management. While this suggested that the topic was not as wholly neglected as it had seemed at first, the literature appeared to be quite fragmented and had, for whatever reason, rather fallen out of favour in recent years. A synthesis and updating of this literature seemed, therefore, like it might be a worthwhile contribution.

In terms of updating, there are certainly some aspects of the earlier literature, such as the gendered language, that would seem likely to disconcert the contemporary reader, but there are also a lot of specific observations on the issues faced in conducting research in organizations that are still very much applicable today. In drawing quite extensively on this literature, some of which dates back to the 1950s, therefore, the aim has been explicitly to counter the general neophilia and parochialism of much research, especially in

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management, which, with a few exceptions, regards anything published more than five years ago or outside a coterie of discipline-specific journals as not worthy of any attention. If matters of contemporary concern were well addressed fifty years ago, or may be of relevance to one discipline despite being published in a journal from another field, we may do better to acknowledge this, rather than reinvent the wheel.

At the same time, it is evident that attitudes to the research process are now considerably more formalized than they were when some of this literature was written. A particularly striking example of this is to be found in the account given by Sir Edward Evan Evans-Pritchard of the guidance on conducting fieldwork that he received from various distinguished anthropologists at the start of his career (Evans-Pritchard and Gillies, 1976: 240).

When I was a serious young student in London I thought I would try to get a few tips from experienced fieldworkers before setting out for Central Africa. I first sought advice from Westermarck. All I got from him was 'don't converse with an informant for more than twenty minutes because if you aren't bored by that time he will be.' Very good advice, even if somewhat inadequate. I sought instruction from Haddon, a man foremost in field-research. He told me that it was really all quite simple; one should always behave as a gentleman. Also very good advice. My teacher, Seligman, told me to take ten grains of quinine every night and to keep off women.

If it is to be hoped that the novice researcher might receive somewhat more substantive and more helpful advice today, it is still surprising how casual the approach to research is, even in literature of the 1970s and 1980s. The researchers' sense of superiority and entitlement in relations with their research 'subjects' can also be grating. It is difficult to imagine, for example, that Dalton's trading of advice to a secretary on how she might attract the romantic interest of a senior company specialist in exchange for access to confidential income data (Dalton, 1959) would be viewed with such equanimity today, or that contemporary students would profess admiration for miners' 'spontaneity' as Gouldner (1955) reports.

What also comes across strongly in this literature, and served to reinforce the belief in the merits of paying greater attention to the practice of fieldwork, though, is the sense that, as Gans (1968: 309) puts it, fieldwork generally, and participant observation in particular, 'provides great satisfactions: discovering new facts, coming up with new ideas, watching people act ... being in the middle of things, meeting new kinds of people'. Gouldner (1955: 250) similarly describes fieldwork as 'simply having a wonderful time' – a view I found echoed in my own experience and also that of many students for whom, notwithstanding the difficulties they sometimes went through, it was often the highpoint of their studies.

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It should be acknowledged, however, that the experience of fieldwork is not necessarily so positive for all researchers. Thus Shaffir and Stebbins (1991: 1) write, of anthropological fieldwork, that it 'must certainly rank with the more disagreeable activities that humanity has fashioned for itself. It is usually inconvenient, to say the least, sometimes physically uncomfortable, frequently embarrassing, and, to a degree, always tense.' Nevertheless, Shaffir and Stebbins (1991: 7) argue,

field research is accompanied by a set of experiences that are, for the most part, unavailable through other forms of social scientific research. These experiences are bound together with satisfactions, embarrassments, challenges, pains, triumphs, ambiguities, and agonies, all of which blend into what has been described as the field research adventure. (Glazer, 1972)

The hope of this book is that it may be of some assistance to those setting out on this adventure.

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Introduction

Chapter objectives

- to identify the scope of topics covered in the book
- to explain the book's focus on the practice of organizational fieldwork
- to introduce the 'getting in, getting on, getting out and getting back' framework around which the main chapters are structured
- · to present an overview of the book

For researchers in a wide range of disciplines, not just those in organization studies, the primary site for their research, that is, the place where they collect their data, is an organization of some sort or another. By an organization we mean a relatively enduring group of people with some degree of coordination around a common principle or objective that has a more or less identifiable boundary. As this definition suggests, many different types of social group may be considered as an organization - a small charity set up to raise funds for a local hospice, a transnational corporation, a network of consultants who offer their services under a common name, or a high-security prison. Just from these examples we can also see that organizations may vary widely in terms of aspects such as their size, motivation, location and degree of formalization. Whatever these differences, the potential significance of which will be considered in the next chapter, the common features of organizations (coordination, collective orientation and boundaries) tend to make them distinctive research sites, compared to studying other social groups such as families, street-corner gangs or residents of a neighbourhood. This book is about the practical issues that may arise when carrying out research fieldwork¹ in organizational settings and what can be done to try to address them.

¹The Oxford Dictionary of Sociology (Scott and Marshall, 2009) defines fieldwork as 'Data collection for any study that involves talking to people or asking them questions about their activities and views, sometimes including attempts at systematic observation of their behaviour. Fieldwork ranges from large-scale survey interviewing by hundreds of professional interviewers, to the lone researcher recording information collected through participant observation in a small-scale case-study. The term is sometimes extended to any research activity that takes one out of the office and into the "field" that is the subject of study. For the purposes of this book the extended definition will be employed, with the 'field' that is the subject of study being an organization or organizations.

In focusing on practical issues, the intention is not to suggest that researchers do not need to know about philosophical, theoretical or more traditional 'methodological' issues, such as survey or experimental design or statistical analysis. There is already such a wealth of literature available on these topics, however, that it would seem more useful to focus on supplementing, rather than attempting to replicate it. References will therefore be provided, as appropriate, to relevant literature on the philosophy and methods of research in organizations, so that the focus can be maintained on the practical issues of undertaking research in organizational settings. A sound understanding of the philosophical assumptions of the study and a well-thought out design, for example, may be essential prerequisites of effective research, but it is also important to be able to put these into practice.

Most of the philosophical, theoretical and methodological issues faced by organizational researchers, moreover, can also be argued to be common to social research in general and therefore addressed by general social research methods texts, whereas practical issues often arise from what will be suggested are the distinctive characteristics of organizations. Thus, while there may have been a 'strong tradition of collections of "inside" views of the process of social research' (Bryman, 1988: 1), some of which include chapters on research on organizational settings, there would not seem to be a comparable literature focusing specifically on organizational research. Nor would the tradition that Bryman refers to seem to have been particularly active since the publication of *Doing Research in Organizations*, with the main contributions being domain-specific works, such as Walford (1991) and Delamont (2002) in education, Gellner and Hirsch (2001) in social anthropology, Randall et al. (2007) in computer-supported cooperative work and Halliday and Schmidt (2009) in law.

Researchers undertaking fieldwork in organizations therefore largely have to rely either on trial and error, improvising solutions to issues as they encounter them; searching for guidance on specific issues in specialist journals; relying on such discussion of issues as may be divulged in papers and monographs (often in confessional appendices rather than in the main body of the text); or seeking the personal advice of more experienced colleagues. While none of these approaches is necessarily inappropriate, locating suitable guidance or developing relevant experience can be costly and there is a risk that lack of broader awareness of issues and ad hoc solutions may inadvertently cause irreparable harm to the research, for example when a mishandled approach to an organization for access results in exclusion from a key research site. This is not to claim that this book offers infallible guidance or that factors beyond the researcher's control may not prevent the successful implementation of even the best-laid plans, but that providing a systematic discussion of potential issues across the whole research process may help to avoid, or at least anticipate, some of the more common problems that can derail research.

A useful way of thinking about this aspect of research in organizations is provided by a widely cited chapter in Bryman (1988) by David Buchanan, David Boddy and James McCalman, which is entitled 'Getting in, getting on, getting out and getting back'. This framing provides the main structure of this book. Discussion of 'getting in' explores the issues of access to organizations, 'getting on' addresses issues that may be encountered in sustaining access, 'getting out' examines when and how to end fieldwork and potential considerations when reporting on such work and 'getting back' looks at possible reasons why a researcher may wish to revisit a research site and how this may be facilitated.

The primary focus of discussion of the research process is practical. This is partly because there are relatively few principles on which it may be considered to be based (and probably even fewer that all researchers would agree on). What is often presented as the guiding consideration in undertaking fieldwork is therefore 'what works' (Buchanan et al. (1988) refer to this as an 'opportunistic approach'). Even if there are principles, however, another reason for a pragmatic approach to researching organizations is that there is so much variability between sites that generalized prescriptions are rarely possible. Organizational research can thus be considered as much of a craft as a science, relying on experience, sensitivity to context and the individual researcher's social skills, even if guided by more systematic principles.

Some, perhaps much, of the guidance offered in this book may therefore appear to be obvious to researchers with substantial experience of working in organizations. If this is the case, all well and good, and sections can be skipped (although it may be advisable to check whether your experience is supported by other researchers' reports). It cannot be assumed, however, that all organizational researchers will necessarily have such experience or will have reflected on it in ways that enable them to identify solutions to the issues discussed. The book also does not claim to offer a magic formula that will ensure that any organizational research project will proceed without a hitch. Rather, by alerting researchers to potential issues and discussing possible solutions, in many cases by reference to published examples of how they have been overcome, the aim is to provide some reassurance that the quagmire of fieldwork, as it can sometimes appear, can be safely traversed and that there is a body of experience available that can avoid each researcher having to 'reinvent the wheel'.

In emphasising the practical, craft-based nature of the research process and the issues involved in getting in, on and out of organizations, this book might be viewed as being applicable only to 'intensive' observational research carried out over a long period of time. While many of the issues discussed in the book are perhaps brought most strongly to the fore in what is sometimes referred to as organizational ethnography, however, a lot of them also apply, albeit maybe to a different degree or in a different way, to more 'distant' forms of organizational

Table 1.1 Key issues in the practice of organizational fieldwork

	Getting in	9	Getting on	Getting out	Getting back
Field experiments	 Identifying sites Negotiating organizational participation 	• • •	Gaining subjects' trust Organizational politics Ethics	Ethics of reporting	Response to findingsResearch fatigue
Surveys	 Identifying respondents Engaging individual participation 	• • • nal	Gaining respondents trust Organizational politics Ethics	Ethics of reporting	Response to findings Research fatigue
Analysis of internal documentation	Identifying sources Negotiating access	• • ses	Gaining organization's trust Organizational politics Ethics	 Ethics of reporting 	Response to findingsResearch fatigue
Interview-based case studies	 Identifying interviewees Engaging individual participation 	• • • nal	Gaining interviewees' trust Organizational politics Emotions Ethics	Ethics of reporting	Response to findingsResearch fatigue
Ethnomethodological work study	Identifying sites Negotiating organizational participation	• • • • • •	Fitting in Gaining organization members' trust Building rapport Recording data Observer effects Organizational politics Ethics	 Personal relationships Planning disengagement Ethics of reporting 	Response to findings Research fatigue
Organizational ethnography	Identifying sites Negotiating access	9	Fitting in Gaining organization members' trust Building rapport Finding a role Recording data Observer effects Observation bias Organizational politics Emotions Ethics	 Personal relationships Planning disengagement Fulfilling the bargain Ethics of reporting 	Response to findings Research fatigue

research. This is the case not just with interview-based studies (some of which may even call themselves ethnographic), but also with surveys and, indeed, with research based on published data.

Problems of access, for example, apply to a researcher undertaking a survey perhaps just as much as a researcher wishing to undertake interviews, although they may be less visible to the former and may be framed as an issue of response rates. Nevertheless both researchers face the challenge, as organizational outsiders, of making contact with relevant respondents/interviewees and of persuading them to engage with the study. Similarly, the issues faced in 'getting on' in an organization, such as incentives for participation and organizational politics, apply just as much to survey respondents as they do to interviewees, even if they are not visible to the researcher sending the survey. Nor, despite their apparent objectivity, are these issues necessarily avoided by research relying on secondary data or published statistics, the possible influences on the original collection of which are rarely considered at the point of use. Highlighting these issues may therefore encourage greater awareness of these influences and their possible implications for research findings.

Table 1.1. presents an overview of some of the key issues in the practice of organizational fieldwork (which are discussed in subsequent chapters) that may arise in different forms of organizational research across the four phases of the Buchanan et al. framework. This is not intended as a comprehensive listing of all possible forms of research or issues that a particular form of research may encounter, but as an illustration of the potential relevance of the topics covered in the book across a range of different forms of organizational research. Italics are used to indicate issues that may not always be immediately evident when carrying out particular forms of research, but which may nevertheless be a potential influence on how the research proceeds.

Overview of the book

Broadly speaking, the structure of this book follows that of the process of organizational research, as described by Buchanan et al. (1988). Before we can begin to think even about 'getting in' to an organization, however, it would seem important to establish an understanding on a number of points that inform the approach to organizational fieldwork that is adopted in the subsequent chapters.

The first of these is to consider what it is about organizations that makes organizational research a potentially distinctive domain of study. Chapter 2 therefore sets out some of the characteristics that could be considered to differentiate organizations from other forms of social research site and explores their implications for the conduct of research. One of these implications can

be seen to be the existence of a range of forms of organizational research, from 'scientific inquiry' to consultancy, each with their different outlook and expectations. Organizations vary too, in terms such as their size, industry, history and location and this may affect how they can be researched. Consequently, it is argued that there is no 'one right way' to study organizations, and that the responses to the issues raised in the book are likely to depend on the interaction between the researchers' approach and the type of organization.

Chapter 3 discusses the research process as it is represented in many research methods textbooks, in order to locate the particular focus of this book and to relate this to the more general methodology literature. The key features of each stage of the process and the methods employed in these stages are identified and their strengths and weaknesses in particular types of study discussed. It will be argued that while such texts may sometimes acknowledge that there can be practical difficulties in conducting empirical research, their primary focus tends to be on the principles of research design, data-gathering and analysis. A more detailed breakdown of the research process will then be presented to highlight the stages that will be the main focus of the book.

Organizational researchers face increasing public expectations that their work will be demonstrably ethical and this is particularly the case in any discussion of fieldwork, where a researcher's practice may be most visible to members of the public. Chapter 4 sets out the nature, scope and principles of social research ethics and identifies four stances on ethics that may be found in organizational research. The chapter also considers the (contested) process of ethical regulation of organizational research in terms of ethical codes, ethical guidance and review and research governance. Discussion of the ethics of organizational fieldwork is not confined to Chapter 4, however. Rather the particular ethical issues that may be encountered at each stage of the research process are considered in the subsequent chapters.

With these understandings established, Chapters 5 to 8 discuss the process of organizational research, following the 'getting in, getting on, getting out and getting back' framework. Thus, working on the assumption that a suitable research topic and research question have been defined, the first stage of fieldwork will involve finding a suitable organization, or organizations, in which to study the chosen topic. Chapter 5 establishes the starting point for the framework. Various ways of identifying potential research sites and establishing contacts are described and their advantages and disadvantages considered, illustrated by examples from the literature.

Assuming that successful contact has been made with a relevant organization, the focus then turns to potential barriers to access and how to overcome them, including such issues as degrees of access; different roles in the access process, such as gatekeepers and sponsors; and the organizational politics of access. Gaining access is presented as a matter of negotiating, formally or informally, the terms of a 'bargain' with the organization. A number of potential terms of this bargain, such as the price of entry, any financial arrangements and possible returns to the organization, will be considered, with particular discussion of confidentiality agreements. Successful negotiation of access, it is argued, is likely to depend on the researcher's interpersonal skills and their ability to persuade gatekeepers that the rewards of allowing access exceed the costs.

After what can be the difficult process of gaining access to an organization, there can be a tendency to assume that the researcher's troubles are over. As Chapter 6 discusses, however, many issues may be encountered even after formal access has been granted. For example, individual and organizational incentives for members of an organization to participate in research and possible reasons for non-participation are explored. Research also often has a political dimension and researchers need to be aware that they may face hostility and encounter manipulation and deceit. The pressures this can create for researchers are discussed and possible measures to address these are presented.

Chapter 7 considers the circumstances of the researcher's withdrawal from the research site. Some potential causes of early termination of fieldwork are discussed and ways to avoid this suggested. When and how to withdraw in a more managed way are then discussed and the need to fulfil the 'bargain' made when negotiating access and the potential consequences of 'cut and run' research are emphasized. Reasons for maintaining access and how this may be achieved are also considered.

As most researchers studying organizations are likely to be interested in publishing their findings, the question of what, how and where work is published, or even proposed to be published, can be a source of considerable tension. Issues surrounding the reporting of organizational research are therefore highlighted, distinguishing between reporting to research participants and reporting to a wider audience, whether in an academic journal or the mass media. Various options for reporting organizational research to participants are considered in terms of what is reported. For example this might be research components, such as transcripts of interviews or summaries of analyses, or research outputs, such as reports or recommendations. Next, those to whom these reports may be made – the organization's management, the research sponsor, research 'subjects' – are identified and potential issues with reporting to each discussed.

Arguments for a right to publish are then presented and some examples of organizations seeking to prevent or restrict publication are described. These are countered with arguments for seeking approval and different approaches to getting approval are discussed. Some problems of reporting organizational research to particular audiences, for example in relation to anonymity and confidentiality and the accuracy of accounts, are highlighted and the ethics of reporting are explored.

Even when fieldwork is considered to have been completed, a researcher may still wish to gain access to the same organization again at a later date. In Chapter 8, possible reasons for such a return to the field are discussed, some barriers to achieving this are outlined and suggestions are made on how these might be overcome.

Research on and in organizations is constantly evolving as organizations themselves change, and discussion in the literature can take some time to catch up with these developments. Chapter 9 seeks to address some of these emerging topics in researching organizations. One of the most prominent of these relates to the various forms of Internet research. Such research raises issues from the use of email and video-conferencing for interviews, or studies of virtual organizations that conduct all, or much, of their business via the Internet, to researching organizations that predominantly exist online. There is some overlap between Internet research and the issues faced in international research, where the increasingly global distribution of research sites, even within a single organization, may preclude face-to-face interaction in some, or even most, locations. International research also faces cultural and linguistic challenges, which, while not new in the context of international business research, are increasingly made more complex by the distribution of staff over multiple locations even within a single function. Finally the chapter discusses research in non-conventional organizations, reflecting the growing attention to the third sector, but also research in difficult-to-access settings, such as the military, in which many of the issues discussed in the book may be particularly marked.

One of the assumptions of this book, discussed in Chapter 2, is that organizations constitute a distinctive domain of research. This claim is revisited in Chapter 10 in the context of an overview of the book's argument. While it is acknowledged that organizational research poses few, if any, unique challenges, it is argued that researching organizations faces a number of issues to a greater degree than other forms of social research. Similarly, while acknowledging that many of the issues are not necessarily new, it will be argued that they have tended to be neglected in much contemporary discussion of research methods and deserve greater attention. Finally it is suggested that the expanding role of organizations in contemporary society, the changing nature of the employment relationship and the growth in the global workforce mean that organizations are becoming increasingly important as research sites and that the issues raised in this book are therefore likely to be of continuing significance for researchers across a range of disciplines, not just management.

EXERCISE

1 Fieldwork in organizations

- for each of the types of study listed at (a) to (e) consider whether they may face difficulties in:
 - o identifying suitable organizations to study
 - o getting agreement from suitable organizations to participate in the research
 - o locating and contacting potential participants in those organizations
 - o gaining entry to an organization's site
 - o persuading organization members to participate
 - knowing whether data collected accurately reflect the situation in the organization
 - o maintaining engagement with the organization over many months
 - o reporting on 'sensitive' findings
 - o gaining re-entry to an organization
 - (a) An industry-wide survey of the adoption of particular human resource practices
 - (b) An evaluation of the implementation of a new production technology
 - (c) An experiment to investigate the effect of workload on creativity in advertising agencies
 - (d) A study of the negotiation of a new international agreement on greenhouse gas emissions
 - (e) A study of how companies respond to new health and safety legislation.

Further reading

In addition to the works cited in the references for this chapter, a further selection of classic articles on fieldwork in the social sciences are included in this four-volume edited collection:

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