

CHAPTER 5

Approaches to gathering data in HR research

LEARNING OUTCOMES

This chapter should help you to:

- clarify the basis for your research
- establish links between your data and relevant theories
- decide what data to gather, and how to gather your data
- highlight key differences between qualitative and quantitative data
- evaluate the quality of your data
- write the methodology section of your report.

HOW TO USE THIS CHAPTER

This chapter draws together some of the themes and issues that have been introduced in Chapters 1–4 to help you to clarify the overall approach and the different types of data that will be most appropriate for your investigative enquiry. By the time you read this chapter you should have an idea about your topic and the focus of your enquiry, as well as some thoughts about the overall research strategy that you will pursue (case study, survey, action research, etc). You should also have done some reading so that you are more aware of where your enquiry fits within what is already known about your topic. Now you need to make further decisions about how you will put your ideas into action and take the project forward in a meaningful, coherent and justifiable way.

An explanation and justification of your investigative methods is required for projects at all academic levels. This chapter will help you to develop that justification. When people are in a hurry with their project they are tempted to skip this stage and launch straight into some form of data-gathering. However, the investment of a small amount of thought at this stage in the project can reap significant rewards in the quality of the investigation that you undertake.

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FROM RESEARCH IDEA TO RESEARCH FOCUS

CASE ILLUSTRATION

Gap means equivalent of women spending two months working for free

The gender pay-gap of 17% is too high and should be a focus of the government's equality efforts, campaigners are arguing. Unions and women's rights group the Fawcett Society have joined forces to highlight the UK's gender pay-gap by declaring today 'Women's No-Pay Day'. They say that the 17% difference between male and female earnings amounts to men getting paid all year and women working for free from 30 October.

Despite the introduction of the Equal Pay Act well over 30 years ago, women working full-time are paid on average £4,000 a year less than men, according to the Fawcett Society. In a recent poll of 1,004 UK adults, the campaign group found that 83% of women and 74% of men think the government needs to do more to close the gender pay-gap, regardless of the temptation to sideline such issues in the face of an economic downturn.

Together with the public-sector union Unison, the Fawcett Society has written a letter to the UK Government Business Secretary ... calling on him to address the 'pervasive' gap. They are also calling for mandatory pay audits to be included in the forthcoming Equality Bill. Katherine Rake, director of the Fawcett Society, said:

In times of economic difficulty, voters want greater support for equal-pay measures, not backsliding. With the Equality Bill, [the government] has an opportunity to support measures that make financial sense during this economic downturn.

Bronwyn McKenna, Unison's director of organising and membership, added: 'Current equal pay laws are complex, weak and ineffective. The legislation must be updated.'

Source: L. Phillips (2008) 'Gender pay gap still pervasive', *People Management Online*, 30 October. Reproduced by permission

DISCUSSION QUESTIONS

Imagine that you are interested in undertaking a project to investigate the gender pay-gap. It is early days yet and you are not clear how you might go about this. You have read this short article and you are wondering if there are any ideas in it that might be helpful.

- 1 Make a list of the propositions that this short article makes about equal pay legislation and pay equality.
- 2 Imagine that you are a student undertaking a project on the gender pay-gap in your own organisation (or a placement organisation). Using ideas from the propositions you have written, come up with one or two research questions that you might try to answer as a part of your study.
- 3 Having formulated one or two research questions, identify what data you might need to answer them.
- 4 Imagine that instead of conducting research in one organisation only, you plan to research the issues across a range of organisations. Identify one or two research questions that you might try to answer and decide on what data you might need to answer them.

FEEDBACK NOTES

There are a number of propositions in this article. The overall thrust of the piece is that current equal pay legislation is complex and ineffective so that pay inequality has not been eradicated in the extensive period of time that has elapsed since the equal pay legislation was introduced in UK. There is also the assertion that women

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are paid 17% less than men. Further, it is argued that there is public support for a change in the legal framework to close this gap. There is also a suggestion that problems in the external economic environment should not deter changes in the law. There are plenty of issues here, therefore, that might stimulate ideas for a possible topic. If you were undertaking research in one organisation, you might think about investigating the extent of any gender pay-gap in different parts of your organisation. You might also be interested in the reasons behind any pay inequalities (or areas where there is no pay-gap). It might be interesting to investigate the extent to which people are aware of or explain any pay differences within their own work environments. You could decide to investigate the extent to which performance management processes or job evaluation processes have an impact on pay inequality. Although some numerical data would be relevant to investigations such as these, it is also likely that you would have to gather data about processes people go through, their opinions about the issues, and their overall perceptions of reward strategy in your organisation.

If you were planning to undertake your research by accessing a range of different organisations, you might choose to ask similar or different questions. You might investigate the extent to which pay inequality is different in different employment sectors (public and private, SMEs and large firms, manufacturing and retail, etc). Whatever you choose, the chances are that the data you gather will be of a different kind. You are likely to focus more on a range of questions asked of a cross-section of different employers. Once these data are collated you can analyse them in order to answer your research questions.

This discussion suggests that there are many different potential ways of approaching investigative enquiries. It is important to think through the issues in order to formulate an approach that is appropriate to your situation and will generate conclusions that are meaningful and valuable. To achieve this, whatever activities you use in your investigation, they must be clearly explained and justified. This chapter seeks to enable you to devise a credible rationale for the method or methods you decide upon for your study. In many ways this is a focal chapter of the book because many of the issues about approaches to research that were introduced in earlier chapters are brought together in this one. The distinctive features of different types of data that are introduced in this chapter will also be considered in more detail later in the book.

QUALITATIVE, QUANTITATIVE AND MIXED-METHODS RESEARCH

Chapters 1 and 2 considered the different ways of thinking about knowledge that affect how researchers undertake their investigations. The objectivist world-view underpins the positivist research approach, which adopts a scientific method of collecting facts and testing for relationships between them in order to make generalisable conclusions. The social constructivist world-view underpins the interpretivist research approach, which examines the meanings and experiences of different people in different situations or cultural contexts in order to understand

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and explain the different realities of human situations. As indicated already, these different approaches to research tend to prefer to use of different types of data. Positivist researchers tend to value *quantitative data* (the term given to data that can be quantified and counted). Interpretivist researchers appreciate the value of *qualitative data* (the term given to data that is based on meanings which are expressed through words and language).



CASE ILLUSTRATION

ARMED FORCES ATTITUDE SURVEY REVEALS MAJOR CONCERNS OVER EQUIPMENT, MORALE AND PAY

Almost half of military personnel are ready to quit the forces, according to a new survey by the Ministry of Defence. The first-ever survey to assess attitudes across the Armed Forces found that 47% of Army and Royal Navy personnel, and 44% of those in the RAF, said they regularly thought of quitting. The 24,000 military personnel surveyed also raised major concerns over equipment, morale and pay. More than half of the respondents were not satisfied with the standards of military equipment, while 40% were unhappy with service accommodation. A sense of over-stretch in all three Forces was also reflected, 45% saying they were not happy with the level of separation from their families. In contrast, 62% of Army personnel said the frequency of operational tours was 'about right' or 'too few'.

Morale was lowest in the RAF, 31% of respondents saying it was low or very low, followed by the Navy (30%) and the Army (27%). Levels of job satisfaction were much higher, although there were significant contrasts according to rank. Almost three-quarters (73%) of Army officers said they were satisfied with their jobs, compared

with 57% of soldiers. Likewise, 70% of RAF officers showed satisfaction, compared with 50% of other ranks.

The MoD said the research revealed 'areas of concern', but added that conditions had improved with the introduction of a number of new measures since the survey was conducted last year. These include a pay rise, an adjustment to the operational bonus, and the introduction of childcare vouchers. A budget of £8.4 billion has also been earmarked for accommodation for the Forces over the next 10 years ...

Source: L. Phillips (2008) 'Half of military staff ready to quit', *People Management Online*, 10 July. Reproduced by permission

DISCUSSION QUESTIONS

- 1 What are the advantages of the survey method for measuring attitudes? How has it informed decision-making in the UK armed forces?
- 2 What other methods might be used to get information about how people feel towards their work organisation?
- 3 Which method of gathering data is best, and why?

FEEDBACK NOTES

There is a range of methods that any organisation can use to find out what people feel about their work organisation. It would be possible to interview people, for example, or engage them in conversation. Alternatively, a series of focus groups could be organised or, perhaps, people could be encouraged to keep some form of journal or log for a period of time, in which their feelings about work and the organisation could be recorded in their own words.

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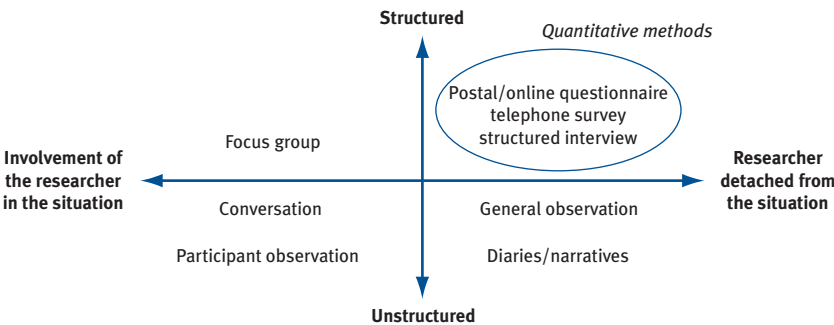
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The attitude survey approach is also a useful way of collecting data. One advantage of it is that because the questionnaire is very structured, it is easily replicable, and so it is possible to compare the results with surveys that have been previously undertaken. Those who are interested in the results are not physically close to those who fill it in, so it also allows for anonymity, enabling people to respond in a more honest way. As a result of both of these factors (structure and detachment) data generated in this way can be analysed to identify relationships between different variables (such as different branches of the armed forces or different levels of employee).

On the other hand it might be possible that the questions in the survey could be interpreted differently by people with different backgrounds (cultural and organisational). Although people filling in the survey will tick boxes, therefore, it may not really reflect what they feel about the organisation. Similarly, surveys can be undertaken by a large number of people, but the depth of their replies is very limited (often a choice of four options). Where the researcher is more involved, it would be possible to probe for meanings and interpretations and to ask why the respondent feels the way that they do in relation to a question.

Consideration of these issues, therefore, might indicate that a mixture of methods whereby both qualitative and quantitative data were used would be helpful. Indeed, it is hard to say what method of gathering data would be ‘best’ because each has advantages but also limitations. Figure 19 provides an overview of the different methods in relation to the extent to which they are structured/unstructured and the level of involvement that the researcher has with the process of gathering data.

Figure 19 Different methods of gathering data



The main differences between qualitative and quantitative data as a basis for research are shown in Table 20.

Table 20 Qualitative and quantitative approaches to research

Quantitative data	Qualitative data
Based in a familiarisation with current research rather than specific situations	Based in a familiarisation with a real-life context or situation
Analysis of a limited number of variables	Analysis of significant themes that are suggested by a range of sources
Concern to establish significant and separate relationships between a limited number of variables	Concern to understand the interrelationships between different factors
Variables are expressed in the language of the investigation	The preconceptions of the researcher are suspended and the language of informants is valued and utilised
Seeks to achieve abstraction from repeated observations	Seeks to find out how people understand a situation and how their understanding influences their actions

Sources: Neuman (2006); Jankowicz (2005)



CHOOSING APPROPRIATE METHODS

CASE ILLUSTRATION

Recent research has established an association between HRM practices and competitive advantage of firms, supporting a causal link that is argued to flow from HR practices to employees’ attitudes and behaviour to organisational performance. ... Theoretically, [the paper] addresses the embedded, or implicit, assumptions of motivational theory that inform most of the research in this field. Although, as Guest (1997) states, motivational theories provide a coherent rationale to the linkages between high-performance work systems (HPWS) and organisational performance, they have rarely been explored from an employee perspective. ... The main research objective is to examine what is inside the ‘black box’ by gathering employee opinions on HPWS/HRM. ... To do so requires in-depth case study research.

Research procedure

Following the research procedure set out by Truss (2001: 1127–9), the question of HPWS and organisational performance was

‘inverted’ by selecting a high-performance organisation and then looking at what HR practices the company employed, and whether these could be constituted as a bundle of high-performance practices or a HPWS. Access was secured on the basis of anonymity – hence the company is given the pseudonym of Healthcare Limited. Healthcare Limited is not only a leading general retailer but also a high-performance organisation.

- *Survey* – The employee attitude questionnaire was distributed to all available full-time permanent shopfloor workers in the four main departments (Powders, Medicinal, Toiletries and Blow-Moulding). A total of 277 respondents completed the questionnaire (just one employee refused to participate in the survey) providing an active response rate of over 99 per cent. The sample was representative with respect to age, gender and other demographic characteristics.
- *Focus groups* – The employee focus

groups were conducted over a two-day period, involving five groups of eight employees. Each group involved two employees from each department, therefore ensuring that there was representation from each department in every focus group. Questions were based on the main themes addressed in the employee survey, as well as issues that had arisen from management interviews and observation. The focus groups followed a semi-structured approach. Interviewees were full-time permanent shiftworkers and ranged from the basic grade/level to line leaders.

- *Observations* – With the lack of data on employee experiences and to gather information on exactly what life on the line was really like, it was decided that a period of participant observation would greatly assist research into the HRM/HPWS and organisational performance

relationship. In conjunction with the employee attitude survey and focus groups, participant observation was conducted in each of the four main production departments.

Source: extracts from S. Pass (2005a) 'Missing links in the "causal chain" between HR practices and organisational performance'. Paper presented to the CIPD Professional Standards Conference 2005. Reproduced by permission

DISCUSSION QUESTIONS

- 1 What are the potential advantages of using both qualitative and quantitative data for this research?
- 2 What difficulties can you identify for this 'mixed-methods' approach to research?
- 3 How confident are you that similar results would have been achieved if this study had been undertaken using data from organisations in other industry sectors?

FEEDBACK NOTES

For researchers who identify strongly with the objectivist/positivist approach to knowledge and research, the use of qualitative data gathered through participant observation and focus groups would have little or no value as a contribution to knowledge about motivation and organisational performance in the workplace. Equally, an interpretivist researcher working from a social constructivist view about knowledge and reality might suggest that quantitative data gathered from an attitude survey would add little to any understanding of what issues such as motivation and performance mean for employees involved in this organisation.

In this case, however, the researcher aimed to explore and examine HR practices and systems as they are experienced in a case study organisation and chose to use both qualitative and quantitative data in order to address the research objective. Thus different kinds of complementary data were used to research the situation with the aim of producing a more rounded description and analysis of the evidence.

Mixed-methods research can also bring difficulties, however. In student projects, for example, time is limited. Undertaking one form of data-gathering and analysis in a systematic and competent way is time-consuming enough. Using more than one method, particularly when the skills required in collection and analysing data are so different, can cause problems of a lack of time and expertise.

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MIXED-METHODS RESEARCH

Many HR researchers, particularly practitioner-researchers, find that they can see the value of both qualitative and quantitative data and feel comfortable with both positivist and interpretivist approaches as a basis from which to develop their research. The term 'mixed-methods research' is often used to describe research that makes use of both qualitative and quantitative data in a way that enables the insights to be mutually illuminating (Bryman, 2006; Bryman and Bell, 2007; Saunders *et al*, 2007). Mixed-methods research provides a number of advantages for HR researchers:

- **Triangulation** – This term is used to describe the process whereby data from different sources are used to examine the findings. Sometimes this will enable you to check whether the interpretation of the evidence that you have makes sense in the light of other available evidence gathered in a different way and so add credibility to your conclusions (Saunders *et al*, 2007). In other circumstances it can reveal the complexity of issues and enable a deeper understanding of them.
- **Developing hypotheses or research questions** – The *Choosing appropriate methods* Case illustration above is an example of research into a new and previously under-researched area. In such cases a qualitative approach might enable an identification of a hunch or a hypothesis about what might be going on prior to quantitative assessment of the issues that have been identified across a wider population.
- **Identifying appropriate people for qualitative data-gathering** – In some cases it may be sensible to undertake quantitative data-collection to get a general picture and, as part of the process, identify some useful sources for more in-depth analysis.
- **Interpreting the relationship between different variables** – A key strength of research based on quantitative data is the opportunity to establish whether relationships between variables are significant or may have occurred by chance. Once significant relationships have been established, the use of qualitative data may permit an explanation of *why* such relationships are occurring.
- **Researching into different levels of an HR issue** – Quantitative approaches to research are often used to consider the issues at a 'macro' level in organisations, whereas qualitative data is useful to understand the 'micro' issues that are also relevant. This has significant benefits for practitioner-researchers where HR research is focused on addressing organisational issues and problems and it is important to achieve a rounded view of the situation.

Although there is no consensus on these issues, mixed-methods research is advocated by an increasing number of business and HR researchers (see, for example, Gill and Johnson, 2002; Bryman and Bell, 2007; Fox *et al*, 2007; Creswell, 2008). In some cases qualitative and quantitative data are gathered and analysed in parallel (as in the *Choosing appropriate methods* Case illustration); in others the data is gathered on a one-after-the-other basis. However, mixed-methods research should not be confused with 'messy methods' research. A systematic and rigorous

approach is required, regardless of the range of the different data types that are gathered and analysed. Key issues for the quality of mixed-methods research are (Bryman and Bell, 2007):

- Ensure a competent and justified research design and execution – Poorly designed and implemented research will generate dubious and unreliable findings even if more than one method is used.
- ‘More is better’ is not an appropriate justification for mixed-methods research. The rationale for choice of method(s) must follow from your research questions or objectives.
- Ensure that you have the time to engage in different data-gathering and analysis methods within the constraints you are under for your student project.
- Ensure that you have the expertise to gather and analyse different types of data. Mixed-methods data-gathering followed by poor-quality analysis will not lead to a valid outcome.

In organisational research, particularly when it is part of a qualification process, there are also other practical issues that influence decisions about methods. Operational issues, time pressures and the preferences and imperatives of others who will be involved in the project – such as the employees, line managers and the project sponsor – will all have to be taken into account. Part of the planning process of any project, therefore, will involve discussion and negotiation about the methods to be used, the participants that will be available, and the time-scale over which the enquiry must be undertaken.

A number of different factors will influence the choice of methods that you make, and these are briefly outlined below.

- *The nature of the topic* – The nature of your research objectives and questions is a fundamental starting-point for deciding on appropriate methods. Key things to ask are: What are my research questions? What data will enable me to answer those questions? What is the most appropriate way to obtain that data?
- *The extent of the literature* – If you know that there is a lot of literature already about your topic, then it is likely that you will choose methods that enable you to build on what is already known. If, however, your area is relatively new and ‘unexplored’, this will also influence your choice of method(s).
- *Time-scale* – Another issue to take into account is the time available to you. Some methods may be possible to undertake over a shorter time-span than others.
- *Resources* – Some methods require specialist resources (perhaps facilities to generate transcripts of unstructured interviews or the availability of quantitative data analysis software), and it is important that you are aware if these are available and if you have time to learn how to use them.
- *Issues of access and permission* – Some project sponsors, in organisational research, have clear preferences for different methods, and these must be taken into account in deciding which methods to adopt and whether the nature of the research questions/objectives might have to be reviewed as a result.

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RESEARCH APPROACH AND THE ROLE OF THEORY

Decisions that you make and preferences that you have for the type of research you plan to undertake will also affect the use that you make of the theories and frameworks in the literature. A further issue to consider with regard to your approach to research, therefore, is the reasoning process that you will utilise. These decisions affect your decisions about:

- where to gather data and what type of data will be appropriate
- how you will make sense of information once you have gathered it.



ACTIVITY

Go to a general search engine (such as google.co.uk or yahoo.co.uk) and type in the search word 'theory'. (Choose to search on UK sites only in order to limit the list.) Glance through the first 10–20 sites that are given as a result of your search. You do not need to open them unless you become intrigued. What impression does the list of sites you have seen give you of 'theory'?

FEEDBACK NOTES

Common sites generated on a search such as this include:

- set theory (a branch of mathematics)
- number theory
- political theory
- media theory
- legal theory
- learning theory
- feminist theory.

As discussed in Chapter 1, the word 'theory' is associated by many people as indicating things that are complicated, incomprehensible, specialised and divorced from the practical reality of real lives. Many HR practitioners, who may also be part-time students, and many organisational sponsors of projects are wary of too much theory – they favour a more pragmatic approach to study, the outcomes of which (they may believe) will be operationally relevant and valuable.

However, this perception of theory is mistaken. As discussed in Chapter 1, everyone uses theories to generate expectations about the world in order to 'make sense of things'. Theories enable us to predict and explain events. We refine our theories by testing them through practice, or by benefiting through the information we are given about the experiences of others when they have used them. The same process is applicable to our practices as practitioner-researchers. We refine our theories by gathering data to see how well the theories explain the

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information we have obtained. Equally, we might obtain information first and then develop or build a theory to make sense of the data in a meaningful way.

Theory is, therefore, both relevant and useful to HR professionals who make use of a range of frameworks. Some will be derived from common sense and some will be the result of more formal research processes published within the social sciences or business and management literature. Maslow’s theory of motivation (Maslow, 1943), for example, still provides something of a basis for a range of career or personal development processes that are undertaken within organisations.

Because theories play an important part in effective HR practice, it is also important that HR professionals are able to evaluate different frameworks to find those that offer the most appropriate basis by which to understand organisational situations and from which to plan and implement HR interventions.



JUDGING BETWEEN THEORIES

CASE ILLUSTRATION

‘Reward management interventions do more harm than good in building trust, commitment and motivation.’ This was the motion debated at a recent symposium attended by senior compensation specialists.

Proposing the motion: John Purcell

Research into individual performance-related pay (IPRP) in the UK over the past decade has failed to show that such systems have an effect on performance. Instead, the growing conviction is that a pay system can at best have no effect on performance, but, at worst, it will damage competitiveness. In other words, a bad pay system has the potential to do more damage than a good one has to bring benefit. ...

The fashion is to link pay systems to business objectives, cascaded down. This sounds good until you realise that, according to recent studies, well over half of employees, including some managers, don’t know what these objectives are.

All control systems distort behaviour – that is what they are there for. Unfortunately, if a particular target is chosen, the tendency is to take your eye off other equally important aspects of performance. Line managers are frequently unclear about what targets to

set for the coming year for IPRP, and some invent things or focus on pet topics.

At a deeper level, the whole idea of linking pay to performance is based on two questionable assumptions. First, it perpetuates the illusion that companies are rational, top-down, directed organisations and that managers have the foresight to know what to do in the forthcoming year. This is the myth of the all-seeing boss. In reality, change is quicker and messier than that. Second, and even more worrying, is the belief that people need incentives to get them to behave in an acceptable way. Employees cannot be trusted, it seems. Economists have a lot to answer for with their assumptions that people will be lazy and self-seeking ‘with guile’ unless there is a reward carrot (or the stick of unemployment) available. This is the foundation for most economic theories of reward. They never change, despite all the evidence that employees place much more value on non-financial satisfaction and the rewards of a job well done.

Opposing the motion: Duncan Brown

I agree that reward management interventions often haven’t had a positive effect on employee trust, motivation and commitment. Reward changes are difficult

to implement, are often bad news for staff, and are especially dangerous when based on simplistic assumptions about HR strategy and 'strategic fit'. ... But there are very good reasons why a large proportion of companies are finding they have to change their reward schemes, and I strongly believe it is better to intervene than do nothing.

In my experience, the problem often lies not in the interventions themselves, but in how these interventions are made. So we should not be throwing the baby out with the bath water but, rather, be taking steps to make these interventions more motivating and effective. ... The pace of change – in economic and product cycles, social and technological developments – is ever faster, and pay and reward practices are not isolated from these shifts. Towers Perrin's latest study, in the summer, of reward management in 460 organisations across Europe found that 94% had made significant changes in the past three years, and 96% planned further interventions. They are using rewards to reinforce the achievement of business goals, and

aligning pay systems with the needs of their changing organisations. This means being less hierarchical and more customer-oriented, team-based, and focused on contributions.

In an economy that is increasingly based on knowledge and service, and in which pay costs can often represent three-quarters of total operating expenditure, companies that do not invest that resource in the most effective way to reinforce their strategy will be overtaken by competitors that do.

Source: extracts from *People Management* (2000) 'Pay per view', *People Management Magazine*, 3 February, page 31. Reproduced by permission

DISCUSSION QUESTIONS

- 1 Identify some of the different generalisations or theories about effective reward systems that are highlighted in this article.
- 2 How can managers judge between different theories so that they do not get caught up in the rush to implement 'fads and fashions' that may bring no lasting benefit to their organisations?

FEEDBACK NOTES

There are a range of different theories alluded to in this extract, including the theory that managers are rational and have the foresight to foresee priorities 12 months in advance. In addition there is the theory that people are not to be trusted and need incentives to get them to behave in an acceptable way.

Broadly speaking, there are two ways of judging between different theories. The first is to try one or other out – test it to see if it works. In this instance this would mean taking a new approach to reward in your organisation and evaluating the effects. Through this process you will be able to measure the extent to which the outcomes predicted by the approach to HR you are testing are achieved. You may find that the process of testing leads in part to what you have been led to expect but also produces some unexpected outcomes, and this would provide a basis for further amendment and development of the original theory.

If you were reluctant to try a theory out as a way of judging its value, you might choose to think critically about the approach that is being advocated first. Here there are questions you might ask, like: What are the assumptions that underpin this theory? To what extent do the various parts or concepts that make up the approach make sense or have value? To what extent can there be a relationship

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of cause and effect between the actions being advocated and the outcomes being promised? To what extent might this theory depend on other factors and contexts? In asking these evaluative questions you are able to form a judgement about whether the approach being advocated is appropriate for all or for some contexts, and you can assess its value taken as a whole.

In HR research both approaches to evaluating theory are valuable, and for your research project it is important to show that you are aware of theories that are relevant to your investigation. Rather than merely accepting them in an unquestioning way, however, it is also important to show you can ask pertinent questions in order to make an initial judgement of their value. For most projects, particularly those linked with CIPD courses of study, it is also necessary to gather data in order to evaluate the impact of some of the component issues of the topic you are considering, in practice. As a result of this you will be in a position to reflect back on the theories and make a judgement as to their relevance and value.

WHERE DO THEORIES COME FROM?

Having established that theory is part of everyday life in HR, at both individual and organisational levels, it is interesting to ask where theories come from in the first place. Gill and Johnson (2002) utilise Kolb's idea of the 'learning cycle' to illustrate the point that theory and practice are 'like two sides of a coin', and that it is possible to understand the relationship between theory and data in terms of how we learn to make sense of the world.

Kolb suggests that learning involves a number of different stages: 'experience', 'observations and reflections', 'formation of abstract concepts or generalisation' and 'testing implications in new situations'. Each stage feeds into the others and Kolb suggests that the learning process can begin at any part of the cycle. This can be illustrated by referring to the learning experience that many HR practitioners go through when they develop their skills in recruitment interviewing. Some HR professionals, in the early stages of their careers, are asked to carry out interviews with no formal training. They undertake their first interviews in a state of nervous tension, armed only with the company's forms and procedures which they have, hopefully, read in advance. They undertake the interview(s) and, afterwards they reflect on 'how it went'. There will be some features of their practice that they are pleased with and some that they will want to improve. They will devise for themselves some general guidelines (the dos and don'ts of interviewing) and they will try them out the next time that they interview. In this way their learning process involves HR practice (doing the interviews), reflection/evaluation (what went well and not so well), generalisation (personal/organisational dos and don'ts) and implementation (applying the dos and don'ts the next time that they interview). This cycle will, of course, repeat itself many times and, over time, the HR practitioner may be able to go on a course or read some books on effective interviewing to enhance the quality of their practice. Hopefully, most HR professionals (the more fortunate ones!) may undertake a course first before moving round the cycle and putting the generalised guidelines for effective practice into action.

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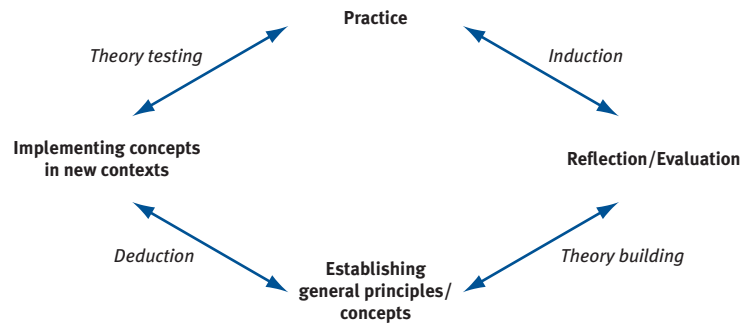
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In this way it is possible to see how, at an individual level, generalised concepts and principles (theories) form part of the normal learning process and are interrelated with obtaining information (data) on the basis of our experience and practice. This approach to understanding the relationship between theory and data illustrates how theory formulation can occur as a result of different reasoning processes within research activities. These are referred to by researchers as the ‘deductive’ and ‘inductive’ approaches.

Figure 20 Inductive and deductive reasoning



DEDUCTION AND INDUCTION

The *deductive* approach to reasoning and theory development is where theories are developed and refined through a process of testing established generalisations. Here a process of logic is applied to something that is thought to be true, a theory is derived, and then the theory is tested out in an empirical way in different situations, conditions and contexts. On the basis of the evidence that is generated through this process of testing, the theory can be provisionally confirmed, amended or discarded altogether.



CHOOSING A RESEARCH APPROACH

CASE ILLUSTRATION

Cindy was a distance-learning HR student who worked in a retail organisation. Like many retail organisations, Cindy’s company was experiencing problems with high employee turnover and the retention difficulties were affecting levels of customer service. Cindy decided to focus her management research report on the issue of talent retention within her organisation. She did some reading about talent management and retention and she soon found that a range of different topics such as employee engagement and employee reward were relevant to her

topic. Cindy recognised that she would need to assess the reasons for staff leaving the organisation, but she also realised that if she was to recommend effective approaches to improve retention, she would also have to find out more about the underlying causes of staff turnover and the factors that affected employees’ decisions to leave (or to stay) in their jobs.

DISCUSSION QUESTION

What approach (inductive or deductive) would be most appropriate for this enquiry, and why?

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FEEDBACK NOTES

Either the inductive or deductive approach might be utilised in researching this area. A deductive approach is attractive in that there is plenty of literature indicating potential causes of employee turnover. It would therefore be possible to test out the extent to which these causes apply to employees in Cindy’s organisation.

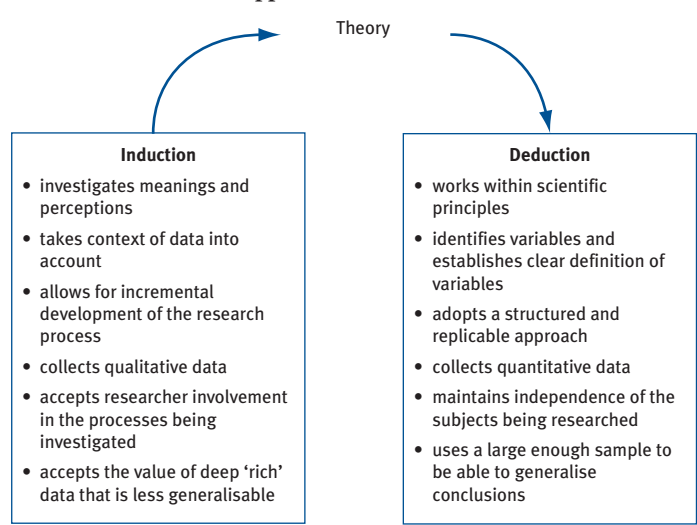
Alternatively, you might feel that individuals have more complex reasons for leaving their job (or even for not leaving). The existing theories may not reflect these perceptions and interpretations that people have about their continued employment, and so it would be better to work inductively. In this way the enquiry could find out from people (without putting words into their mouths) just what factors influenced their decision on whether or not to leave.

The *inductive* approach starts at the level of practice. Through a process of observation over a period of time it is possible to establish some general propositions about the nature of what has been observed, and in this way a theory is generated. Thus the process begins with a relatively clean sheet. Behaviour or facts are observed, and on the basis of this a generalisation or theory about what is happening (and why) can be developed.

In reality once a theory has been generated in an inductive way it may be further developed through empirical testing in a deductive way. Both approaches, therefore, are rooted in practical reality. Some researchers operate deductively by gathering data to see if existing theory is confirmed. Other researchers start with more of a clean sheet and gather data in order to build theory to explain the evidence that they have gathered.

The main features of the inductive and deductive approaches to research are shown in Figure 21. This indicates the different relationship with theory of the two

Figure 21 Inductive and deductive approaches



approaches. Both deductive and inductive approaches have value in HR research and organisational enquiries. The points summarised below (Robson, 2002; Saunders *et al*, 2007) represent ends of a continuum rather than a hard-and-fast distinction. Where a mixed-methods approach is being adopted there can also be interaction and overlap between them.

Deduction (theory testing)

- Deduction can involve the formulation of *hypotheses* (statements which the theory suggests would be true).
- Hypotheses are then *operationalised* such that the variables involved can be identified and measured. This measurement can be undertaken for this enquiry, but also the same approach could be repeated in a different situation.
- Data is gathered and the information is used to test whether the hypotheses can be confirmed.
- The outcome of the enquiry, as shown against the original hypotheses, is either to modify or to confirm the theory from which the hypotheses were derived.

Induction (theory building)

- Induction involves observation and investigation into the relationship between *meanings* and *actions* of human subjects.
- Data is collected without prior assumptions about categorisation and measurement.
- The context of the situation is incorporated into the analysis process as the research seeks to understand the internal logic and purposive nature of human actions.
- The outcome of the enquiry is to suggest/build a credible explanation of behaviours that have been observed.
- There is less concern with the need to generalise although further avenues for research may be identified.

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RETHINKING METHODS

CASE ILLUSTRATION

Isabelle was a full-time HR student who had undertaken a work placement in a public utilities organisation a number of months before her dissertation work was undertaken. When undertaking her placement she had found out that the organisation was planning to restructure its HR function in line with the ‘business partner’ model. Isabelle was very interested in the business partner model and although her placement was long since completed, she contacted the organisation again and obtained permission in principle from them to evaluate the new approach for her research project. Isabelle’s research objectives were to assess the benefits and challenges of the new HR roles. Having undertaken some reading on the business partner model as well as on different HR function structures, she decided that the most appropriate way to gather data to enable her to answer these questions was a questionnaire to all the HR staff and to a sample of line managers in the organisation.

Although the company had agreed in principle to Isabelle’s research, when the time came for data collection she found it increasingly difficult to make contact with the ‘gatekeeper’ (her contact) at the organisation. In spite of this Isabelle pressed on with preparations for devising a questionnaire. Following numerous unanswered emails and calls, the organisational gatekeeper finally made contact. The deadline for the research report was approaching fast when Isabelle was told that the restructuring had been delayed and that it was felt that a questionnaire about the benefits and challenges of the business partner model would be premature.

DISCUSSION QUESTIONS

- 1 What issues would Isabelle have to take into account in this situation?
- 2 What advice would you give her?

FEEDBACK NOTES

This situation, which is not uncommon, raises a number of issues and questions such as: Is the project feasible in the light of these developments? Should Isabelle change her topic? Should she try to arrange access to an alternative organisation? Issues that would have to be taken into account include: Over what time-scale must this project be completed? (Often time is short for full-time students.) And how much work has already been undertaken as part of the project?

In the end, Isabelle decided to continue with a project on the business partner model but to revise the project objectives. Instead of trying to measure the effect of the change to HR roles she sought to investigate the reasons for the introduction of the new approach and how the change was perceived by those in HR and by line managers. These revised objectives meant that she could focus her data-gathering on a smaller selection of managers and utilise a more open-ended interview method, rather than relying on a questionnaire sent to a large sample of line managers.

In organisational research, therefore, the process of choosing methods by which to gather data is not a static or a linear one. It will involve a process of review and

revision in consultation with those involved in the project (the subjects) as well as those for whom the final report is intended (the organisation and the project supervisor/tutor/adviser). Nonetheless, it is important that the methods that are finally chosen and utilised are appropriate to the research objectives and will enable conclusions to be drawn that are credible and trustworthy.

DATA QUALITY ISSUES

A key issue for any investigative enquiry is its credibility – the extent to which the data that has been obtained is both relevant and valuable. To make this assessment it is necessary to consider the quality of the data and the way in which the analysis has been undertaken. *Reliability*, the extent to which similar results would be obtained in all similar occasions, and *validity*, a judgement about whether the data really provides evidence about what it is supposed to be about, are key terms that are often used in assessments of the quality of research.

As abstract concepts, both validity and reliability can seem difficult to understand and apply in practice. In particular, because they have been developed from within the positivist approach to research, they present challenges for qualitative researchers, who work with different understandings about the nature of knowledge and reality. Nonetheless, qualitative researchers are also concerned about data quality and the credibility of research processes. Key questions that relate to data quality are (Easterby-Smith *et al*, 2002; Robson, 2002):

Questions relevant to assessing data reliability/credibility

- How likely is it that the method used would generate the same or similar results on other comparable occasions?
- To what extent has the researcher communicated clearly about how data has been collected and analysed?
- Would similar observations be reached by different observers?
- Is it easy to understand how raw data has been gathered and analysed?

Questions relevant to considering validity/trustworthiness

- What difference might the context of the investigation make to data that is generated?
- To what extent has the enquiry process itself influenced the possible answers?
- How easy is it to separate cause from effect in the data (the chicken and the egg scenario)?
- How sure can you be that other factors (intervening variables) have not affected your data?

The Activity below provides an opportunity to consider how these questions would apply in a practical situation.

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ACTIVITY

Validity and reliability

Imagine that you are undertaking a project to investigate the effectiveness of organisational communication processes in an organisation. You will be obtaining information through interviews from a range of people in different departments and at different levels within the organisation. Try to determine what the main practical issues might be with regard to the data quality in a project such as this.

FEEDBACK NOTES

Important questions you would need to consider in a project such as this might include the following.

Reliability/credibility

- Would interviews about communication processes that took place just *prior* to a limited departmental restructure process generate different findings if they were undertaken just *after* the new structure had been announced?
- Would interviews carried out by someone from the HR function within the organisation generate the same data as interviews that were carried out by an external researcher?
- To what extent might two different people make sense differently of the same raw data that was generated by the interviews?

Validity/trustworthiness

- To what extent does data generated in interviews just after the department restructure process actually reflect opinion about communication processes, or might it really provide opinions about the restructure by interviewees?
- To what extent will interviewees give you the answers they think you want?
- If an interviewee whose job role has been marginalised since the restructure is negative about communication in the organisation, can the researcher be sure whether the restructure process leads to negative perceptions of communications or whether negative perceptions about communication then lead to the employee being given less responsibility in a restructure process?
- How confident can you be that what you have found out about organisational communication would also be applicable in different types and sizes of organisations?

No one project is going to be able to produce findings that are one hundred per cent reliable and valid. Whatever philosophical position you adopt in your research relating to the nature of knowledge and reality, and whether you gather qualitative or quantitative data, you must address these issues. If good-quality research is to be undertaken, it is important to take an approach to data-gathering that minimises the limitations of your study and maximises its credibility. This

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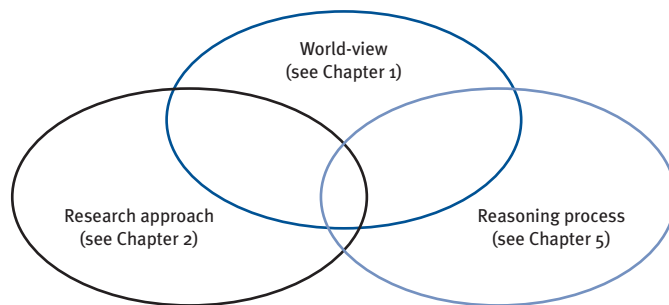
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means taking a planned approach to gathering data and being able to justify the decisions that you make. This will be done in the methodology section of the report or dissertation that you write.

PLANNING TO GATHER DATA

The term ‘methodology’ is used differently by different authors, but in this book it is taken to mean the philosophical framework or orientation within which your research is based (for example, positivist or interpretivist). Your methodology is important because it provides the foundation for the particular method or methods of data-gathering that are used. The methodology section of your report should therefore address what world-view underpinned the approach you adopted to gathering and making sense of data. Although some study centres, for some qualifications, do not require an extended discussion of these features, they are still worth thinking through (if not writing about) because they will form the basis from which you can take consistent action and gather and analyse data of good quality. If your study centre requires you to consider these issues in your methodology chapter or section, three interrelated issues require explanation – as indicated in Figure 22.

Figure 22 Key issues to establish in your methodology



The methodology that you articulate forms the basis for the justification of your research design and the specific tactics or methods of data-gathering that are used. Having established your initial position with regard to your own world-view, the research approach that you will work within, and the extent to which you will adopt an inductive or a deductive reasoning process, it is then necessary to explain and justify the way you have designed and executed your research. Although some study centres (increasingly few) may not require a full explanation of the more philosophical features of your research approach, every study centre will require a full justification of the methods of data-collection and analysis that you have used, as well as your sampling strategy and your approach to accessing respondents. Key points that are helpful in determining these features are indicated below and further illustrated in Figure 23.

- *Clarify the research questions/objectives and research approach first* – Planning the methods for any study is a logical sequence of judgements made by the

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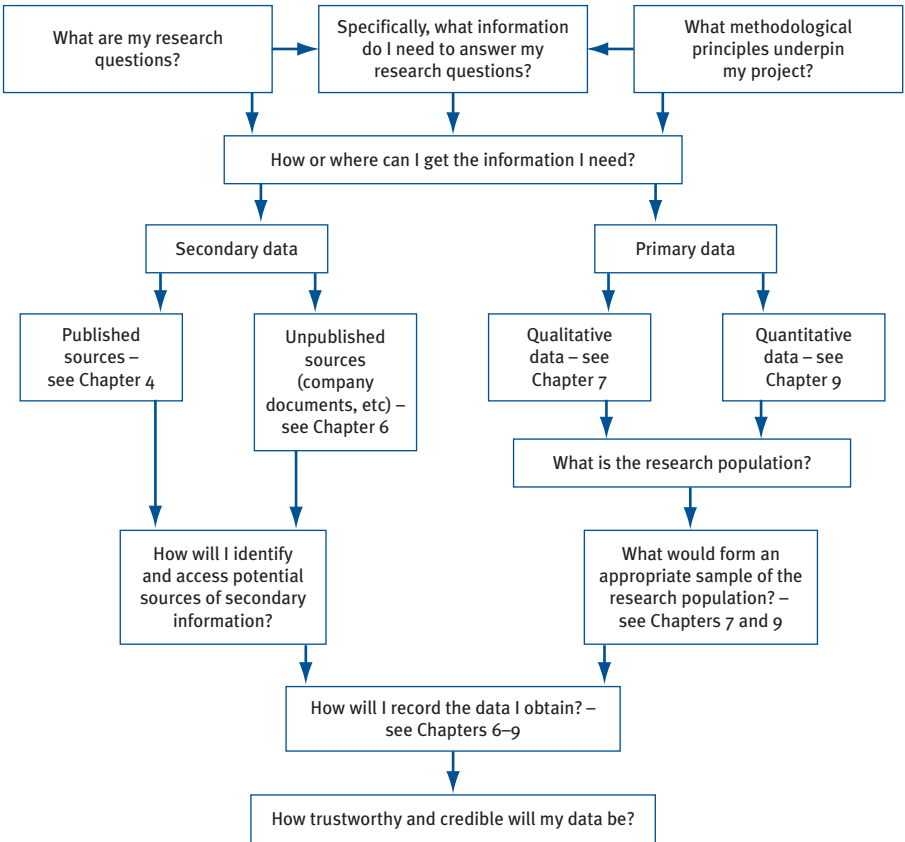
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researcher, taking into account what is possible in the context of the enquiry. The first decisions relate to the research questions or objectives. These decisions will involve discussion with other stakeholders in the project (the organisation(s) and your supervisor, tutor or adviser, etc). It is also necessary to be clear about what reasoning approach will be adopted (inductive or deductive, etc) because this will affect the way you organise your reading and the data-gathering methods that you choose.

- *Carefully consider what information you need to find in order to answer your questions and achieve your objectives* – Many students obtain information that is easy to find but is not always sufficient to answer their research questions. Work out what information you need and where you might be able to get it. Then decide the extent to which this is feasible. Again, discussions with the project sponsor in the organisation(s) and your supervisor/tutor/adviser are likely to be important.
- *Consider what different types of sources of information and data are available to you and make use of as wide a range as possible of different sources* – Many students rush to collect some form of primary data (eg questionnaire data or

Figure 23 Factors influencing research methods



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focus group data) and they do not utilise other available information such as documentary evidence that already exists within the organisation or secondary data from a range of published sources. Ideas about this are in Chapter 6.

- *Clearly identify and justify the research population and your sample selection* – The research population is all the subjects (people) within the scope of your investigation. Is your study to be concerned with all employees in the organisation, one particular business unit or department, one specific staff grouping? It is unlikely that you will be able to gather data from the whole population (unless it is very small), so some form of sampling will be required and you will need to consider, and justify, how you will choose the people who will form your sample. This may also have to be discussed with the project sponsor at organisational level and with your supervisor/tutor/adviser. Issues of sampling are considered in more detail in Chapter 7 (qualitative data) and Chapter 9 (quantitative data).
- *Decide on the type(s) of primary data that you will gather and allow time to devise and pilot effective data-gathering instruments* – Many people choose to use a questionnaire method because they think it will be quick, or the interview method because they think it will be easy. However, many then find that their questionnaire has been misinterpreted by a large number of respondents or that their interviews did not provide sufficient information to answer their research questions. All forms of data-gathering require considerable thought in the design process, and it is also important to allow time to pilot the instrument (and then amend it in the light of the pilot) prior to launching into the full-scale data-gathering process. Many student centres now insist that the project supervisor, tutor or adviser sees and approves all data-gathering instruments before they are used. See Chapters 7 and 9 for more on this.
- *Decide in advance how you will record the data that you gather and then how you will go on to analyse it* – As part of the planning and design process for any primary data-gathering instrument it is important to be clear about how you will record the data that you get and then how you will go about analysing it. These issues are covered in Chapters 6–10.
- *Consider issues related with data quality* – If you can, get someone to act as a devil's advocate and try to expose areas where the data quality of the approach you are planning to adopt could be questioned. As noted already, no organisational study can ever be wholly valid and reliable, but being critically evaluative at this stage will enable you to address any issues that you can resolve. You will also be better placed to discuss the advantages and limitations of your study within the report that you produce.

WRITING UP THE METHODOLOGY

Different study centres have different expectations about what the methodology section should include. What is expected will also depend on the level of the qualification (undergraduate, postgraduate diploma, master's, etc). It is very important to find out in advance what the requirements of your study centre are

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with regard to the indicative length of the methodology section and also the key areas that must be included within it. All project reports must explain and justify how data (primary and secondary) were gathered and analysed. The points below indicate the key issues to address, as a minimum, for *any* investigative enquiry. The threshold of what should be included would be greater for many qualification-related projects, and this is discussed further in Chapter 11.

- *Appropriateness of the methods* – What was the context for the research? For research in one organisation – what was the organisational context? What was the nature of the relationship of the researcher with the organisation(s)? What were the research questions? What approach to data-gathering (qualitative, quantitative, both) was adopted, and why?
- *Quality and quantity of data collected and analysed* – How were secondary sources identified (literature search as well as any organisational documents, etc)? What primary data were gathered? How was a sample selected? How were data-gathering instruments (questionnaires, interview questions, etc) developed? What were the response rates, and what are the implications of the response rates? How was the data analysed?
- *Management of access and co-operation* – In what way did the context of the study influence the research process as it actually occurred? What ethical issues were raised by the project, and how were they handled? How were non-returned questionnaires or other refusals to provide data taken into account?
- *Evaluation of methods* – What issues of validity and reliability were there? What were the advantages and limitations of the methods and research process used?

SUMMARY

- There are many different ways of tackling research projects in HR: positivist, interpretivist or mixed-methods. It is important to formulate an approach that is contextually appropriate and will generate data and conclusions that are meaningful and valuable.
- Quantitative data (data that can be quantified) and qualitative data (data based on meanings and expressed through language) are both relevant to HR research. Both approaches can form part of research projects that generate useful knowledge. Mixed-methods approaches may also be utilised effectively within HR research.
- Organisational research and decisions about methods of gathering data will be influenced by contextual factors such as operational issues, time pressures and the preferences of organisational stakeholders.
- Theory and practice are not separate things. People use theories in everyday life to generate expectations about the world and to make sense of things. Theories are refined through practice so that everyday experience informs the generalisation process.
- Theories can be evaluated by testing them empirically (in practice) or by analysing their component parts to establish the extent to which they make sense.

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- Theories are developed through the processes of induction and deduction. Induction (theory building) involves observing facts, behaviours and meanings to form a generalised theory about what is occurring and why. Deduction (theory testing) involves identifying propositions from existing theories and assessing them in different situations, conditions and contexts in order to refine and amend them where appropriate.
- The value and credibility of an investigative enquiry can be assessed by considering issues such as the validity, credibility, reliability and trustworthiness of the data on which the conclusions are based.
- All project reports require a section that explains and justifies the method or methods of data-gathering and analysis that were used. Different study centres have different requirements for this section.
- The methodology section of any report should evaluate the appropriateness of the methods for the particular enquiry, the quality and quantity of data collected, the appropriateness of the analysis processes, and the management of access and co-operation.



REVIEW QUESTIONS

These questions are designed to enable you to identify key areas for development with your project. The responses to them can also form part of a Continuing Professional Development log or portfolio. This is a requirement of the CIPD for those who wish to upgrade their membership status.

Taking stock

- 1 Find out about the requirements of your study centre for the methodology section of your report. What sort of word count is expected? What headings or key issues should be included?
- 2 What are the expectations of the organisation(s) with which your research will be concerned? What organisational issues or priorities might affect the methods by which you gather data or the timing of your data-gathering activities?
- 3 What secondary data sources (organisational documents, etc) are available to you? What level of permission will you need to obtain company information? Who are the 'gatekeepers' of such information?

Strengths and weaknesses

- 4 How has your review of the literature informed your thinking about methods of data-gathering? How satisfied are you with your review of the existing literature?
- 5 How clearly articulated are your research questions/objectives? To what extent have your research questions informed your decisions about the research design and data-gathering process?
- 6 What is your level of expertise in designing instruments for data-collection (questionnaire design, interview design, facilitating focus groups, etc)? What development might be helpful in this area, and how might you undertake it?

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- 7 What knowledge and understanding do you have of sample selection processes to enhance reliability and validity? Where might you obtain effective advice about this?
- 8 What experience and level of expertise do you have in recording and analysing quantitative and/or qualitative data? Where can you learn more about these activities?

Being a practitioner-researcher

- 9 What skills will you need to enable you to obtain access to organisational information (primary and secondary) and to achieve the co-operation of participants in the enquiry?
- 10 To what extent have organisational stakeholders got firm ideas about the methods you should use? What skills will you need to manage these expectations and ensure the quality of data that you gather?



EXPLORE FURTHER

Useful Reading

Bryman, A. (2006) ‘Integrating quantitative and qualitative research’, *Qualitative Research*, Vol.6, No.1: 97–103.

Bryman, A. and Bell, E. (2007) *Business Research Methods*. Oxford: Oxford University Press.

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