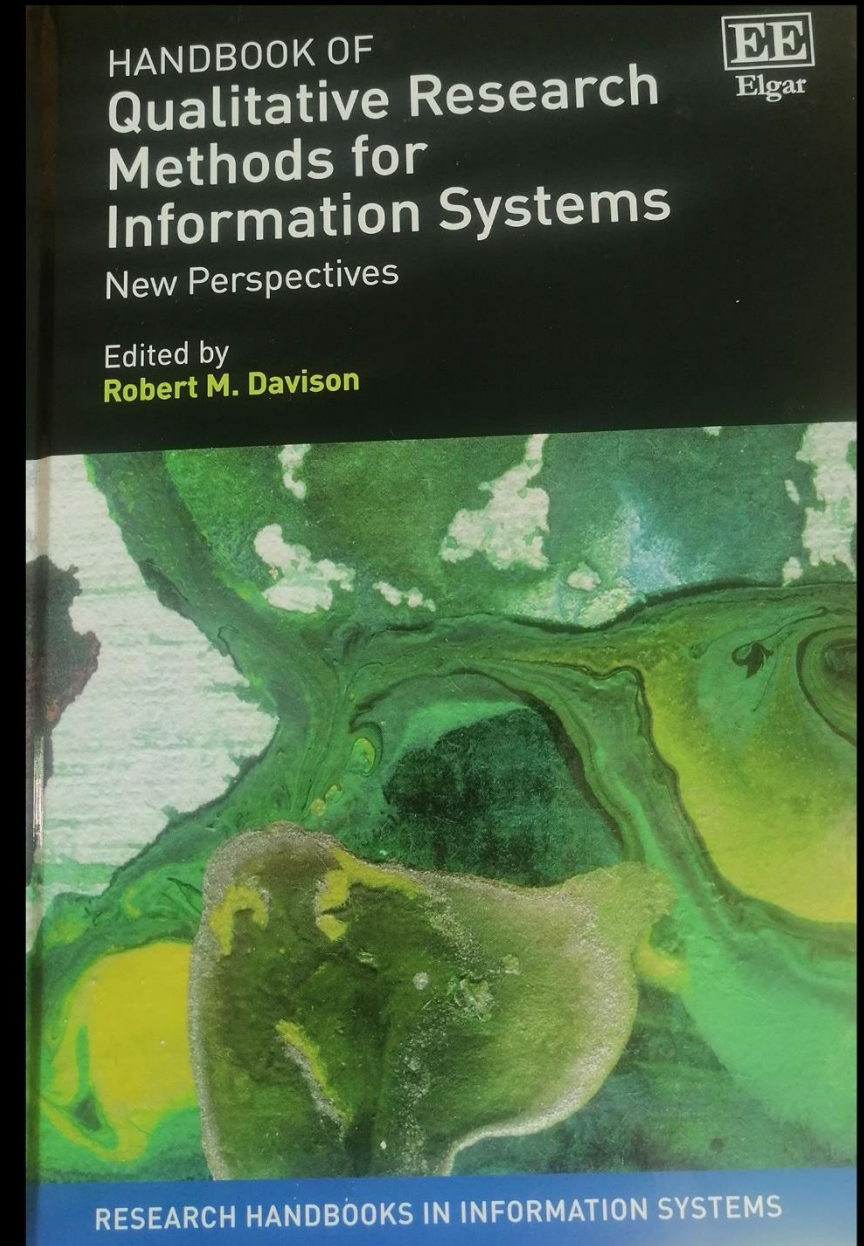


Qualitative Research Methods for IS: New Perspectives



Why a New Book?

- Advances in the field happen all the time
 - They may be accessible via journal articles, but these are not always easily accessible and so bringing material together in a book format makes sense
 - You can write things in book chapters that you cannot in journal articles!
 - My hope is that the book will be valid for 10 years or more
- A way to bring together a disparate yet coordinated set of authors who are experts in their own right
 - And recognise them for their excellence
- The book is publisher-bundled via university agreements, so is quite widely available

How to put it together?

- Organically!
 - Start with a short list of topics
 - Then bring colleagues into the conversation
 - Then brainstorm who else might be interested to contribute
- My role as Editor of ISJ and EJISDC helped a lot, because I accept methods articles from time to time
- I invited people to write chapters: there was no democratic open call
 - Most accepted, and a few who promised still failed to deliver
 - I had to help some authors quite extensively, so I ended up writing and contributing to more chapters than I had anticipated
- Yes, it's a labour of love!

Editorial Style

- To empower authors, i.e., to push them to go further than they had imagined possible
- To micromanage as little as possible: a lot of reminders but few text edits
- To macromanage the overall process and structure to ensure that we meet deadlines
- To take tough decisions when necessary ...
 - When one author simply stopped communicating ...
 - And another reported that her husband had just died, ...

Teaching Qualitative IS Research

- This was the chapter that I most enjoyed writing yet was also the chapter that I never expected to write!
- It was originally to be written by a pair of authors, one of whom stopped communicating (I still find it inexplicable) and the other couldn't push him/her to do so
- So, I took over this chapter, with three colleagues and we four wrote it together
- It was a chance to put into words what we all been practicing, experimenting, trialling and erroring!

The Why of This Chapter

- What is the situation regarding the teaching of QIS, what challenges are faced, why do we need this chapter?
- “As authors, we have lost track of the number of times that a reviewer has told us that ‘empirical = numerical’ and that qualitative research is thus non-empirical, unscientific and unworthy of publication”
- A reviewer told me “I have to say that I’m not particularly keen on ethnographic methods. Your paper lacks empirical analysis. There appears to be a glaring lack of quantitative data to support this research”
- These kinds of comments illustrate why we need to raise the level of awareness of what qualitative IS research is (and is not)

But ... there is another aspect to the 'why' of this chapter

- As qualitative researchers, we engage with practice and collect data. How should we teach this engagement? What about ethics?
- For instance, I gain access to an organisation and permission to interview people, but this permission comes from the gatekeeper.
- The individual people whom I interview (with their consent) usually have little agency, little interest in the research. It may be a waste of their time, even a cause of a loss of income.
- Yet they can't easily refuse to cooperate, other than by remaining silent. They might give inconsistent or misleading answers to annoy us!
- When interviewees behave like this, the research suffers.

So, Teaching Qualitative IS Research

- Requires a singular attention to the practice of qualitative IS research
- We can teach how to do case studies, ethnography, action research, etc. but until the student actually engages with the method and experiences the ‘how’ of doing it, there will be little true comprehension, and any apparent knowledge will be no more than a pretence of knowing.
- “the only way one can really know things... is through a process of self-discovery. To know things, you have to grow into them, and let them grow in you, so that they become part of who you are” (Ingold, 2013).

Thus, in teaching, we start with the basics

- There is no point in drowning the student in a sea of terms that will bewilder and frustrate
- Let's keep it simple
 - What is qualitative data? (yes, there are arguments, but later)
 - What kinds of methods and what are their assumptions?
 - What about epistemology? Or data analysis? Literature?
 - Theory, because we can't avoid it and the data will only make sense if there is theory (yes, we can argue, but later)
- But we don't want to introduce too much complexity too soon
- A few articles to provide context, a few sample methods

Challenges to Overcome

- Myths and Misconceptions
- Lack of clarity and consensus about qualitative research
- Tensions associated with in-depth exploration of a phenomenon and the language skills (or barriers) that many researchers have (or experience)

Myths and Misconceptions

- Qualitative research is unscientific
 - The small n sizes
 - The impossibility of statistical generalisation - what is the qualitative equivalent of $p < 0.05$?
 - The failure to appreciate non-statistical generalisation, e.g. to theory
- Qualitative research is too risky
 - It takes too long to do
 - It is harder to publish
 - Reviewers don't like it
 - So, careful apprenticeship is needed

Myths and Problems

- Qualitative research is an art not a science, and therefore can't be taught
- If you are naturally a creative person, that's fine, but if not, forget it
- There are no clear boundaries between different methods ...
 - Action research may be published as case study
 - Grounded theory as a technique can be used within other methods (even if no actual theory emerges)
- ... but in a dynamic field, a lack of agreement is common

Issues of Clarity

- There are so many different methods!
 - Action research
 - Discourse analysis
 - Hermeneutics
 - Narrative and metaphor
 - Semiotics
 - Case study
 - Ethnography
 - Grounded Theory
- Where are the boundaries?
- What about mixed methods?
- What is qualitative rigor?
 - “undertaking research according to strict standards and controls appropriate to the methodology” (cf. Zmud, 1996)

Context and Language

- The language of the data (and the course) may not be the researcher's first, or second
- This may complicate both teaching and data collection
 - Linguistic subtleties may be ignored
 - What did the interviewee mean?
- The easier solution is to use existing protocols as far as possible and to adapt them when needed
- Face validity is important – run a pilot test
- Experience will help – don't use 3rd parties to help
- Practice! Practice! Practice! And watch others do it.

Practicalities 1 Teach Theory & Method in Tandem

- Theory is a sensitising device for researchers, helping them to make sense of the data
- So, students must become with theory from the very start
- By combining theory and method, so each can illustrate the other
 - Here is a theory, see how it is supported by data
 - Here is data, see how it helps to build or test a theory
- Don't let the students just sit! Make them engage by leading parts of classes.

Practicalities 2: Being by asking ‘why?’

- Critical to all research is the motivation, the why.
 - What are the authors trying to do?
 - Who are they doing it for?
 - Whose perspective are they representing?
 - What new knowledge do they hope to contribute?
 - What is the alignment between motivation and method?
 - How are the authors problematising their research?
 - Who cares? And not just academics or managers!
- Are there existing theoretical perspectives?
 - Should we modify them? Develop new theory? What kind of data?

Practicalities 3: Put Ideas into Practice

- We can ask students to read methods papers, or exemplar studies that illustrate methods and theory, but ...
- Students need to have a go, try it out.
- Of course, ‘trying it out’ does not guarantee success, and an early failure may be dispiriting, so the instructor/supervisor must provide a lot of support
 - Help in accessing a case and its data, e.g. in an organisation
 - Help in the conduct of the research, how to do the interviews
 - Help in data analysis: e.g. Gioia-type thematic analysis
 - Help in writing up (at least giving constructive feedback on drafts)

Practicalities 4: Critiquing and Reviewing

- Students will learn a lot from writing critiques of published qualitative research articles
- They may be familiar with quantitative methods, so be aware that they may apply the same standards
 - Sample size, statistical rigour, intercontextual generalisability, etc.
- So, we need to provide guidance on how to review qualitative work
 - Theoretical saturation, purposive sampling, data coding techniques, generalisation to and from theory
- We provide worked examples of reviews, i.e.
 - here is a paper that was accepted, and here are all the reviews that the paper received over n versions + revision notes;
 - Learn the 'how' of the writing/revising/reviewing process

Practicalities 5: Reading and Writing

- Over a 13-week course we expect that students will read a lot!
- Methods papers, perspectives, commentaries, and editorials!
- This reading is part of the ‘learning how to write’
- Anyone can encounter a mental block when faced with the need to write (students particularly)
- We suggest that the act of writing is also the act of thinking, so any writing can be useful – it doesn’t have to be linear
- By the end of a course, we expect to see written critiques of published papers and proposals for a qualitative enquiry
 - We suggest 2000-word limits. It is easy and easier to write more, but we need to learn conciseness as well!

Practicalities 6: Start with Vanilla

- It is better to start simple, because the novice student may otherwise be asphyxiated by the complexity
- Learn the basic approaches first, before approaching the complex
- A single case in a single small organisational setting that does not extend far back in time
- Imitate the simpler cases before approaching the complex ones
- We do not expect PhD students to introduce significant methodological innovations just yet
- Use simpler analytical approaches
 - Gioia approach has been critiqued, but it is easier to apply as a beginner

Practicalities 7: Practice! Practice! Practice!

- Experiential learning needs to be embedded in the course design
- We do learn on the job through apprenticeship, experience, trial & error
- Teaching concepts without practical application is futile
 - Students need first-hand experience of putting things into practice
- Try the ‘dramaturgical’ model of interviewing!
 - Interview each other on a question like “How does one become a good research student?” or “How could this course be better designed?”
 - Record it, transcribe it, reflect on it
 - Use the Gioia method to analyse the transcripts

Concluding Thoughts

- This chapter, and the whole book, are designed to help students get to grips with qualitative research
 - We acknowledge the myths and try to dispel them
 - We acknowledge that it can be hard, but find ways to make it easier
 - We provide practical guidance for teachers and students
- There is a role for the supervisors, who may themselves be unfamiliar with (or disparaging about) qualitative research
 - Our task is made much easier by a supportive and collegial atmosphere, where qualitative research is genuinely valued as having the potential to contribute to knowledge