

MATCHING RESEARCH METHODOLOGIES WITH ORGANISATIONAL EXPERIENCES: MAKING ROOM FOR HEAD, HEART AND SOUL

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ABSTRACT

I researched those things in organisations that have affected me personally, spiritually and intellectually. I matched my research methodology with my organisational experiences which were chaotic and non-linear. This paper focuses on the methodologies that I used, which are emergent and enabled me to move beyond static models and plans.

My research and its outcomes

Is any writing original?
Are these my own thoughts and ideas?

I don't think so
They came from being with others

From sharing experiences together
From observing and trying to understand the differences

Perhaps all that I can do is use my own words
To express what so many of us feel and know.

I have always thought deeply about organisations and their impact on people. More so, as the rapid pace of change and complexity seems to be speeding up and organisations are responding by continual rounds of restructuring. It seemed to me that organisations were becoming more and more out of control, while paradoxically, imposing more and more controls.

I believed that I would be able to find some answers to the problems that I observed, through the theories and models that I was studying. Unfortunately, the gap between the theory that I was reading and the reality that I was experiencing was too wide. So, I began a meta reflection on my work projects and work experience.

The more I researched, the more I became convinced that there were few answers and no 'quick fix' solutions. Think of all the solutions that the experts have given us - and I ask, how much has really changed? I decided that all I could do was share my thoughts with others.

But was this all that I wanted to share? The more I thought about it, the more I realised that I wanted to share what was in my heart and soul and that this is what usually remains invisible and unspoken within organisations.

I see and I feel
But the organisation values doing and knowing

I like to question and stretch the boundaries
But the organisation intimidates me into silence

I love to learn
But the organisation doesn't always welcome my learning

How can I find a place for me and my heart in the organisation?
And how can I share my heart with you all?

Two key propositions emerged during my research. The first, is that many critical things remain invisible and unspoken in organisations and consequently untheorised. This usually centres around issues such as love, spirituality and involvement of both head and heart in organisations.

The second, is that there is a need for continual movement and the recognition that this is what occurs all around us, whether we are conscious of it or not. We create a lot of problems for ourselves when we pretend things are static and try to stick to one model, paradigm or process.

As I researched these issues, a number of questions kept resurfacing, questions that kept me passionately involved, but ones that I could not necessarily find 'the answer' to. Despite the body of ancient and modern wisdom and knowledge around and within us, why can't we create the futures we desire so much? We learn a lot intellectually, but why do we have such difficulty in implementing it in practice? Why don't our practices match our theories? Why do we think that by changing plans, skills and outcomes, we can change organisations? Why can't we see that the changes come from relationships and primarily from within ourselves? Why do we increase our focus on controls, when our traditional methods are failing us more and more? How can we resurface spirituality within organisations? How can we make the invisible, visible? Is what I am experiencing with the people I work with, what the whole organisation is experiencing?

I found it difficult to keep researching with so many unanswered questions. However, the questions kept me focused, as I attempted to clarify sources of confusion and despair often felt by people within organisations. It enabled my research to be a "process rather than a product, _ experience rather than work and _ lived rather than done" (Melamed cited in Reinharz 1992, 217 - 218). There were no clear answers and a key paradox that emerged was that even though change depends on learning, learning is not sustaining our change.

Research framework

I researched what it was like
to think, do and be
in an organisation

I explored myself deeply
and called it 'heuristics'
(to keep the academics happy)

I explored in a way that women tend to do
and called it 'feminist perspective'
(to keep my supervisor happy)

I researched in a spontaneous and non-linear way
and called it 'fuzzy logic'
(to keep my examiners happy)

I researched the organisational impact on people
and called it 'human inquiry'
(to keep them all happy)

I questioned theoretical assumptions and designed models
and called it 'grounded theory'
(to keep my research focused)

I justified, wrote, corrected and revised
in a way I'd never have to do
If I wasn't researching at the edge.

I needed to study what I was actually experiencing and observing. According to Reinharz (1984), this is not what researchers usually do. Researchers (including herself, initially) usually follow a pattern of rigid adherence to problem formulation, data collection and data analysis. However, research in the field can be experienced as "an unfolding, ever-changing process" (Reinharz 1984, 150). This is what I experienced during my research process. It created feelings of anxiety and doubt, which needs to be expressed as part of the research process.

We are absolutely sure only of what experience gives us; but we should accept experience wholly, and our feelings are a part of it by the same right as our perceptions, consequently, by the same right as 'things' (Bergson 1992, 212).

In bringing my whole self to the research process, I wanted to work towards what Reinharz (1984, 151) achieved with her later studies, when she developed a "greater sense of identity and trust in [herself ... and could] ignore the mythical rules and work according to an inner set of guidelines that permitted flexibility and change". Shepherd (1993,166) describes this as a nurturing approach to

research, as it "allows unconscious processes, the movement of the spirit, and the voice of the soul to speak rather than limiting us to information from only rational sources".

Despite my recurring confusion and doubts, I've managed to remain with constantly changing questions and the confusion this creates. Surely more of a meta learning and meta research journey than the traditional linear approach?

Research paradigms

I selected the interpretivism (constructivism) paradigm (Robottom and Hart 1993) as the one most closely describing the paradigm within which I researched. This paradigm states that "reality exists only within the context of a mental framework or construct" (Robottom & Hart 1993, 9). Through my own mental framework, I viewed my research from a humanist/spiritual perspective. I believed that we have to search for the truth that resides within ourselves and we cannot separate ourselves from the people and events around us. Consequently, I made my own meaning, which can result in knowledge being problematic and everchanging (Robottom & Hart 1993). I continuously experienced this.

As an inquirer working within this paradigm, I aimed "for internal rather than external validity" (Robottom & Hart 1993, 10) and my work needs to be read within this context.

Key aspects of my methodology

My methodologies embraced four interrelated key aspects (see Figure 1): ontology, epistemology methodology and expression. Ontology is about "how things are"; epistemology is about "how we can know something (or perhaps nothing) about the matter" (Bateson 1972, 313 - 314). According to Bateson (1972), it is impossible to separate the two. I experienced this both within my research and within organisations.

Interrelated with ontology and epistemology, is the approach we use to 'find out'. We usually do this through plans and measuring outcomes. However, I chose a non-planned, heuristic, non-linear methodology which impacted on the form of expression I used. Expression is usually verbal, intellectual and linear. There needs to be provision for a wider variety of expression within organisations, to recognise the heart as well as the intellect and to express this in an emergent way.

The enormous diversity of modern thought as we in fact find it around us in every form from poems to equations must be acknowledged if we are to understand anything at all about the Life of the Mind. (Geertz 1993, 14).

Figure 1: Key Aspects of My Methodology

ONTOLOGY
 EPISTEMOLOGY
 METHODOLOGY
 EXPRESSION
 BEING
 KNOWING
 THINKING
 DOING
 SAYING

This represents my belief in self, human nature and spirituality and their interconnectedness. We (and everything around us) are in a constant state of fluidity, so the nature of reality as we perceive it, also changes constantly. I am trying to make the connection between how I then think and know. This involves learning about learning and reflecting on how my knowing is constructed. I need to 'find out', through ways that are congruent with fluidity and reflection, thereby enabling me to be more responsive to the moment. I did this through methods such as diary writing and being a participant/observer. I am trying to express this in my writing as an emergent process, linking heart, voice, mind and being. I believe that I brought these four key aspects together in my research, interrelated and intertwined, as they are in real life. In this way, we learn to braid together praxis (theory and action) and poesis (imagination and soul). I did this within a qualitative research framework.

Qualitative research framework

Qualitative research can be defined as

an umbrella term covering an array of interpretive techniques which seek to describe, decode, translate, and otherwise come to terms with the meaning, not the frequency, of certain more or less occurring phenomena in the social world (Van Maanen 1983, 9).

This approach enabled me to delve more deeply and personally into the complexity and uncertainty that I was experiencing within organisations. The danger I faced was one of overinterpretation i.e., "reading more into things than reason permits" or underinterpretation i.e., "less into them than it demands" (Geertz 1993, 16). I have probably done both.

The interrelated methodologies that emerged are represented in Figure 2.

Figure 2: Research Framework

Qualitative research approach	feminist perspective heuristics approach
Research methodologies	human inquiry fuzzy logic grounded theory
Research methods	participant/observer diary research learning group critical research friends

FEMINIST PERSPECTIVE

I employed many of the approaches used by feminist researchers, even though I did not undertake feminist research as such. I was involved in researching both emotionally, as well as intellectually.

[A] major feature of feminist epistemology is its refusal to ignore the emotional dimension of the conduct of inquiry _.[which] involves not only acknowledgment of the affective dimension of research, but also recognition that emotions serve as a source of insight or a signal of rupture in social reality (Fonow & Cook 1991, 9).

I have experienced so much understanding and knowing through my feelings and emotions, but have primarily focused on reason and logic at work. It was during the early stages of my research that I started to feel the dissonance. As I look back, I can see that frequently during my life I have been silent in the presence of 'authority'. I thought, felt and often intuitively knew 'the solutions', but lacked the confidence to speak out. I felt shaky and 'voiceless'. With this background, I started my research journey looking for objective, external answers and solutions to problems within organisations. I found it impossible to proceed along this path for long and I turned to my own, subjective knowing, undertaking my research through a 'feminist perspective'.

I want to find my own voice
I want to say what I want to say
I want to have the courage to say it
I don't expect you all to agree with me
I know that you may see things differently.

I was involved in reflexive processes (Fonow & Cook 1991) and dealt "with dilemmas that have no absolute solutions" (Reinharz 1992, 4). I used my intuition to inform what was most appropriate for me to research and record.

Intuition and a nonsystematic approach to reading are cognitive/emotional processes that feel like feminist innovations to those who engage in them because they defy main stream definitions of how one should do scholarly work or science (Reinharz 1992, 232).

HEURISTICS APPROACH

Knowing the self and taking a personal stance was essential to what and how I researched.

Heuristics encourages the researcher to go wide open and to pursue an original path that has its origins within the self and that discovers its direction and meaning within the self. It guides human beings in the process of asking questions about phenomena that disturb and challenge their own existence (Douglass and Moustakas 1985, 53).

I filtered what I saw through my own 'window of the world'. I concentrated on those things that were important to me, that I felt touched my heart and that would sustain me through a number of years of research. As Hill (1997, 1) said, "it is more important to be clear about and follow your 'passion to inquire' than a 'methodology' ".

As my research and learning proceeded heuristically, it spontaneously took a path of its own and kept unfolding, like peeling off the layers of an onion. A good analogy, except that onions make you cry but so do organisations!

The fact that I was unable to clearly identify the problem within organisations sustained my research. According to Ulrich (1994, 22) if you can completely define a problem, you no longer have a genuine problem.

HUMAN INQUIRY

Many methodological processes supported me in my human inquiry, i.e., in making sense of human activity and experience and in combining both my objective and subjective approaches. I met with a Research Learning Group over a period of four years. I received feedback from a number of people who I considered to be my Critical Research Friends. They advised me on organisational issues and research approaches, and supported me in pursuing my research rigorously. I valued the support of each Critical Friend, in particular my research supervisor, Judy Pinn from the University of Western Sydney Hawkesbury, who sat with me during my uncertainty and confusion, and believed in what I was doing and always gave me the courage to continue.

I arrived with such confusion
I must be the only one to have ever felt like this!
This state is permanent
I will never be sure again
Who am I to add to the body of knowledge?
But one meets a guiding light
Understanding
Sure of the process
Have faith
Stay with it

It's all part of the process
And something exciting will come out of it.

PARTICIPANT/OBSERVER METHOD

I was a participant and observer in organisations that I worked in. I observed on a daily basis the crises and difficulties experienced by myself and others within the organisation, and listened to many views about the impact of change. As a participant, I was not always able to be an impartial observer and I was aware of the bias that I must have. However, in situations where motives, attitudes, beliefs, and values direct much, if not most of human activity, the most sophisticated instrumentation we possess is still the careful observer - the human being who can watch, see, listen ... question, probe, and finally analyse and organize his direct experience (Guba & Lincoln 1981, 212).

My research could be criticised as being subjective, centred in the self and dependent on my own analysis. Nevertheless, the strength of my approach is that it presents an alternative point of view from that of an impartial or semi-impartial observer. I believed that I could say some important things that could only be seen and said by a participant/observer.

My research led me to perceive that what organisations value are: tasks before relationships and learning; power and ego games before decisions for the good of others; doing before being; planning before values; focusing on 'what is' and not on 'what could be'. And I dreamed that it could be different.

I want to work in new ways
I want to try to do new things
I want to be ego-less

But I know that I can't quite make it
So, I continue to dream of how it could be.

FUZZY LOGIC

Fuzzy Logic supported me in moving beyond rational, numerical and linear thinking and analysing, to thinking and analysing in a way that matches our environment, which is filled with vagueness, chaos and uncertainty. Fuzzy logic makes room for alternatives and diversity and accepts that not all can be controlled and calculated. I looked at many issues from many points of view and there was no neat and tidy conclusion that I could draw. The answers kept changing as my awareness levels changed.

The theory of fuzzy logic was introduced in 1965 by Lotfi Zadeh, who mathematically computed with words instead of numbers to represent vagueness, which he saw as more realistic than precision. Zadeh (1996, 3) says:

The role model for computing with words is the human ability to reason and make decisions without the use of numbers. A case in point is the problem of parking a car. A human can park without making any measurements.

In social systems and research, the use of imprecise words and descriptions aren't usually tolerated. It's a difficult predicament, where time or funds spent have to be accounted for, yet effort and outcomes are often unmeasurable. (We just pretend to measure them). It's relevant and timely that the underpinnings of organisations and of research, and not just computing and engineering (where fuzzy logic was first introduced), be questioned.

New and 'fuzzy' ways include the need to set few rigid goals (Dimitrov & Kopra 1996). This would have to be one of the most challenging goals for both our research and our organisations, as it is fundamentally contrary to how they operate. That's why I have taken the approach that I have, as I wanted to see if anything would emerge from matching research method to experience in organisations. I involved myself in rounds of learning and change, sitting in the confusion often without plans or pre-set structures and solutions. And in the end, seeing how it does get better as we research our way to new understanding and practice.

DIARY WRITING

The method that allowed me to bring together all of the issues that I was grappling with in my research was diary writing. Diaries have always been a source of data collection in fields such as anthropology (Geertz, 1993), action research (Kemmis & McTaggart 1988) and grounded theory (Strauss & Corbin 1990). Geertz (1993, 58) suggests that diaries can only be kept "spontaneously" and "colloquially", with perhaps an illusion that we know best about our own experience, and about the experience of others. This may be so.

I chose diary writing as my primary source of data collection because it enabled me to write regularly, personally, emotionally and intellectually. From the writing emerged interpretations and explanations that I could discuss with others. I relied on my own descriptions, which Van Maanan (1983) describes as fundamental to data collection in qualitative studies. I checked with my Research Learning Group and Critical Friends that my work was both objective and subjective, and used thinking form as well as feeling form. The Diary gave me a rich source of data.

GROUNDED THEORY METHODOLOGY

Grounded theory methodology can be defined as the "discovery of theory from data" (Glaser & Strauss 1967, 1). The theories that emerged during my research were about:

1. questioning assumptions underlying organisational theories and developing my own set of assumptions;
2. developing a whole-of-organisation model of complexity;
3. identifying the individual as the key to effectiveness within organisations;
4. acknowledging that human beings are unpredictable and consequently their behaviour in organisations is unpredictable;
5. observing that we do not behave as described in many organisational theories or organisational plans;
6. therefore there is a need to be guided by principles, relevant to the individual and to groups.

These theories emerged unexpectedly because I was working with a basic contradiction - method implies classification, but I had decided to research without a plan. A plan would only tell of my "desire to control a reality that is slippery and evasive and perplexing beyond comprehension" (Wheatley 1994, 26). I will have "reduced and described and separated things into cause and effect, and drawn the world in lines and boxes" (Wheatley 1994, 27 - 28). I've attempted to be linear and logical for most of my life - I now needed to do it differently. My plan would come out of my writing and not vice versa and I wanted to find the 'emergence'. I needed to prove to myself that it could be done. That it could be different to most working environments, where plans are imposed as prerequisites for outcomes, with an assumption that the beginning and end should be the same, i.e., as planned in advance.

Validity and reliability

In researching in this way, i.e., with understanding as the primary rationale for the investigation, the criteria for trusting the study are going to be different than if discovery of a law or testing a hypothesis is the study's objective (Merriam 1988, 166).

I have not attempted to achieve validity and reliability of my research findings through methods such as measurement and experiment. Instead, it emerges from the integrity with which I approach my subjective and objective experiences, and through the transparent audit trail and extensive documentation of the processes that I used.

Guba and Lincoln (1981, 213) suggest that "replicability of any given experience is less important in understanding human behaviour than is the recognisability of the description by those who lived the experience". Those who have read my work in progress have certainly 'recognised' the situations that I have described and the conclusions that I have drawn.

More than an external experience

I brought my whole self to the research journey - emotionally, spiritually, intellectually and physically. I believe that this is what we need to bring to our organisations.

My work may be seen to be more for myself than others. I particularly wanted to get to know myself better during the research process. However, as Krishnamurti (in Lutyens 1954, 12) says, "to know oneself is to study oneself in action, which is relationship". And through my own actions, in relationship with others, I wanted to help change the way things are within organisations. I looked deep inside myself and this was not easy to do.

Everyone can have noticed that it is more difficult to make progress in the knowledge of oneself than in the knowledge of the external world. Outside oneself, the effort to learn is natural; one makes it with increasing facility; one applies rules. Within, attention must remain tense and progress become more and more painful; it is as though one were going against the natural bent (Bergson 1992, 41).

Bergson (1992, 41) asks: "Is there not something surprising in this?" We would think that we know our internal selves best. However, our minds keep focused on external matters and when we do focus on the internal, it has a dramatic impact on our lives and our research.

I jumped into the deep end of the pool
To see if I could swim or not
And sometimes I found people to hold hands with
And other times I didn't.

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