

## **The Multidimensional Usefulness of Grounded Theories Editorial**

Astrid Gynnild, Editor

This issue of the Grounded Theory Review demonstrates the multidimensional usefulness of doing grounded theories. Raising awareness through systematized conceptualizing is undoubtedly the number one reason for generating grounded theories. But, as demonstrated in the conceptual discussion of applying GT by Barney G. Glaser, raising awareness is just one of many benefits of the method.

The general section in this issue contains three theories that focus on human patterns of coping with change, but from very different disciplinary perspectives. The grounded theory of *struggling with and for* by authors Berit S. Brinchmann and Henrik Sollie provides crucial insights into everyday challenges of parents of hard-to-treat ADHD teenagers. Their GT indicates that parents experience just as many problems with the helping agencies as with their own teenagers. Identifying this double bind relationship to the helping agencies opens up new ways of understanding family strengths and capabilities, and might help to build professional support upon familiar coping strategies.

In a similar manner, Barbara Yalof, in her GT study of online learners, identifies the various ways that online students of different temperaments respond to a main concern of helplessness and isolation. Their challenges are resolved through *marshaling resources*, which indicates that peer-to-peer support systems are more important in online learning than facilitators may have previously realized. The marshaling resources theory helps explain how unmet student needs might cause some students to drop out and other students to feel empowered, and supports the idea that developing support networks is of great importance for online students as well as for their institutions.

Jan Green and Ben Binsardi's grounded theory of *trenchant remedying* challenges existing assumptions of individual resistance to change in management literature. The authors identify effective change concern resolving behaviours in private-sector businesses; behaviours that represent what the authors call "an antithesis to traditional change management solutions." It is pointed out that organizational change is uphill and uncertain, requiring prolonged and persistent effort. The grounded theory of trenchant remedying proposes that the most important solution is expended vigor and effort. The authors identify four levels of individual change efforts, and *trenchancy* as the theoretical complimentary concept in order to complete the change. The theory is indeed useful for the further development of management approaches in a time of constant change.

Each of the above theories implicitly highlights credibility, relevancy and usefulness as important aspects of using the grounded theory method, albeit in very different areas.

Following up these crucial issues, we are also very happy to present, in short form, a conceptual discussion drawn from the latest writings by co-founder of grounded theory, Barney G. Glaser. The paper "Applying Grounded Theory" by Glaser identifies application and usefulness issues of grounded theories. He discusses how properties of

GTs are often, more or less purposely, applied to situations, populations, or areas of interest, and how extended awareness of applying GTs might lead to further investigations of a field. Glaser also points out that GTs are often applied almost automatically “as an informal conceptual explanation as it may occur in casual conversation or happening.” This fact says something important about the potential strengths and impact of GTs. The article is identical to the first chapter of Glaser’s coming book on *applying* grounded theory, an aspect of grounded theory building which until now has drawn relatively little attention, but might be of great importance to all parties involved.

In the last paper of the section for shorter conceptual discussions, Isabelle Walsh suggests grounded theory as a methodological remedy in management science in order to avoid what she calls research misconduct. Walsh argues that researchers should follow the basic assumptions of grounded theory when conducting quantitative studies and mixed-method approaches so as to make their research more credible.

Finally, this issue of the Grounded Theory Review presents three book reviews: Naomi Elliott critiques Barney G. Glaser’s book *Memoing: A Vital Grounded Theory Procedure* (2014), Pernilla Pergert reviews Barney Glaser’s book *No Preconceptions – the Grounded Theory Dictum*, and Alvita Nathaniel reviews *The Rediscovery of Grounded Theory* by Barry Gibson and Jan Hartman.

Have a good read!

## **Struggling with and for A Grounded Theory of Parents Managing Life with Hard-to-Treat ADHD Teenagers**

Berit Støre Brinchmann, University of Nordland and University of Stavanger  
Henrik Sollie, Norwegian University of Science and Technology

### **Abstract**

The aim of this study was to develop a grounded theory of being a parent of hard-to-treat teenagers with the diagnosis of ADHD. Caretakers of 11 adolescents with ADHD were interviewed and analyzed according to the principles of classic grounded theory. The parents' main concern was how to handle everyday challenges with the teenagers and how to get the help they needed and required. *Struggling with and for* is the core category in our findings. In addition, we identified four sub-categories: *good "mothering", advocating, seeking support, and giving up*. The meeting with the helping services causes just as many problems as the relationship with the teenagers. Professionals should be able to identify family strengths and capabilities. In that way, professional support can be built upon coping strategies with which a family is already familiar.

**Keywords:** ADHD, coping strategies, grounded theory, parents, professional services, teenagers

### **Introduction**

Attention-deficit/hyperactivity disorder (ADHD) is one of the most common childhood psychiatric conditions. The core symptoms of inattention, hyperactivity and impulsivity affect the child's adaptive functioning. In addition, a high proportion of children with ADHD present with comorbid conditions such as oppositional and conduct disorders, anxiety and depressive disorders, tics, and Tourette's disorder, with implications for impairment and clinical interventions (Barkley, 2006; Brown *et al.*, 2001; Gillberg *et al.*, 2004; Steinhausen *et al.*, 2006). Studies have also shown that co-occurrence of clinically significant ADHD and autistic symptoms are common (Reiersen & Todd, 2008). An extensive review estimates an ADHD worldwide prevalence rate of 5.3 percent, but with a substantial variability across studies (Polanczyk, de Lima, Horta, Biederman & Rohde, 2007). Methodological characteristics such as diagnostic criteria, source of information, and the requirement of impairment for the diagnosis were associated with the different prevalence rates. A majority of children diagnosed with ADHD continue to meet criteria for the condition during adolescence (American Academy of Child and Adolescent Psychiatry, 2007; Faraone, Biederman & Monuteaux, 2002; Mannuzza, Klein & Moulton, 2003), but the symptoms of hyperactivity and impulsivity tend to decline at a higher rate and at an earlier age than the inattention symptoms (Biederman, Mick & Faraone, 2000).

Compared with parents of children in normal population samples, parents of children with ADHD report consistently more demanding, disruptive, disorganized and impulsive child behavior with a significant impact on homework, family routines and playing with other children (Coghill *et al.*, 2008). Children with ADHD and comorbid disorders display poorer functioning than children with ADHD alone, and negative effects on quality of life have been reported across several psychosocial, achievement, and self-evaluation domains (Booster, DuPaul & Eiraldi, 2012; Danckaerts *et al.*, 2010; Escobar, Soutullo, Hervas, Gastaminza, Polavieja & Gilaberte, 2005; Wehmeier, Schacht & Barkley, 2010). Two comprehensive reviews present studies documenting associations between child ADHD and family and parental characteristics; such as higher rates of parental psychopathology, conflicted parent-child relationships, disturbances in marital functioning, inconsistent parenting practices, and reduced parenting self-efficacy (Johnston & Mash, 2001; Deault, 2010). Several studies also report high levels of parenting stress among families of children with ADHD (Anastopoulos, Guevremont, Shelton & DuPaul, 1992; Reader, Stewart & Johnson, 2009). The elevated levels of stress may result from the ADHD symptoms themselves, comorbid conditions, and the demands and challenges experienced by parents because of the child's behavior.

When ADHD persists into adolescence, the youth and the parents are faced with additional challenges related to normal developmental tasks of autonomy and individuation. The teens may question both the label of the diagnosis and different treatment regimes, impulsivity may result in potentially dangerous activities, and, increasingly, attentional and organizational capacities are required for academic success (McCleary, 2002; Williamson, Koro-Ljungberg & Bussing, 2009). The parents must cope with stressors that arise from the child's behavior. Lazarus and Folkman (1984) define coping as "constantly changing cognitive and behavioral efforts to manage specific external and/or internal demands that are appraised as taxing or exceeding the resources of the person" (Lazarus & Folkman, 1984 p. 141). Coping research has identified two major groups of coping strategies: efforts to alter the cause of the stress (problem-focused coping), and efforts to regulate the emotional responses to stressors (emotion-focused coping). The problem-focused coping may include active problem-solving and aggressive interpersonal coping. Emotion-focused forms of coping involve strategies such as denial, detaching from the demanding situations, or blaming oneself for the problems (Judge, 1998), but also efforts to reduce emotional distress confronted with stressors not easy to change.

The challenges faced by parents when rearing a child with ADHD may be perceived in different ways, resulting in different coping strategies. Experiences from living with a child with ADHD have been described by several authors (Bull & Whelan, 2006; Firmin & Phillips, 2009; Hallberg, Klingberg, Reichenberg & Møller, 2008; Harborne, Wolpert & Clare, 2004; Moen, Hall-Lord & Hedelin, 2011), and more specifically, different family management styles have been described (Kyle, Conlon, Strassle, Vinh & Trout, 2008; Kendall, 1998; Kendall & Shelton, 2003). Seeking professional support is an important theme in parents' coping with the challenges related to the rearing of a child with ADHD. In Norway, children with ADHD have a high level of service use compared with children with internalizing problems, and most children with ADHD have been in contact with school services and special mental health services (Heiervang *et al.*, 2007). This may be due to the disruptive and academic consequences of the ADHD symptoms. In addition, a diagnosis of ADHD is required to initiate a medical

treatment. Even if the rate of service use is substantial for children and youth with ADHD, too little is known about the perceived helpfulness of these services.

The aim of this study was to develop a grounded theory of being a parent of hard-to-treat teenagers with the diagnosis of ADHD.

### **Data and Method**

The informants were recruited from a follow-up study of parents of children who had been assessed and diagnosed with ADHD at one of five child psychiatric outpatient clinics in middle Norway. Because the aim of the study was to develop a grounded theory of being a parent of hard-to-treat teenagers with ADHD, the participants were recruited from a subsample of the participants in the follow-up study. The participants were recruited by at random from this subsample until we regarded the number of informants as adequate by using saturation of data as a guiding principle. Caretakers of eleven adolescents were interviewed and the informants were seven mothers, three fathers, one adoptive mother, two stepmothers and two stepfathers. Four of the mothers were single caretakers. At the time of the follow-up-study – one year before the interviews – all children except one fulfilled the parent-rated symptom criteria of ADHD Combined type, and all children were medicated for their ADHD symptoms. Three of the children were girls and eight were boys, and at the time of the interviews, the children were between 12 and 16 years of age.

The first author conducted eleven qualitative interviews with the parents in the period 2009–2010. Some parents preferred to be interviewed alone, others with their partner. The participants were encouraged to speak openly about the experiences that were most important, relevant, and problematic to them. The interviews focused on the youth's development in relation to significant persons and arenas, the parents' process of seeking help, and satisfaction with the help they achieved. Field notes were taken during the research process or immediately after data collection. Data collection and analysis occurred simultaneously.

All interviews were tape recorded and transcribed verbatim. In accordance with classic Grounded Theory (Glaser & Strauss, 1967; Glaser, 1978) the transcripts were analyzed several times and line-by-line using the constant comparative method. The analysis comprised open and selective coding, writing memos and theoretical sorting and coding. A core category and four subcategories were identified.

#### Fit, work and grab

Glaser & Strauss (1967) do not use the terms validity and reliability. The point is not whether another researcher will find the same categories to interpret the data, but if the findings are attention worthy. It is the final grounded theory that is evaluated, the theory must fit, have grab, and work (Glaser, 1978). Fit implies that the generated categories are indicated by data, and can be led back to data. This means that the researcher must be meticulous and accurate when data are coded, so that the categories represent data; one lets the data speak. This process must be conducted thoroughly, so that data are not forced into unfinished codes and categories that result in premature theory. This means that the theory explains what happens, predicts what will happen, and interprets what

happens. In other words, that the theory is useful in practice and meaningful for practice. Grab means that the theory is relevant for the participating group in practice. That the theory has grab will also imply that it is the easiest and the most striking one, that the material captivates the reader. During the research process, the findings were presented at national and international research conferences, and received good feedback from professionals who know the field and the issue.

### Research ethics

All informants had received written information about the project. Confidentiality and anonymity were safeguarded according to ethical research guidelines. Informed consent was obtained from all participating parents. The study was approved by the Regional Committee for Medical Research Ethics, Health Region IV, and by the Norwegian Data Inspectorate.

### The pre-understanding of the researchers

The first author is a researcher with a specialty in qualitative research methodology. She is also the parent of an adult with ADHD. The informants were informed about this, and it seemed that this inspired them to speak openly about their situations. The researcher was not only interested as a researcher or a professional, but she also had experience as a parent. The second author is a psychologist with long clinical experience with families of children with ADHD. He has conducted a follow-up study of parents of 217 children diagnosed with ADHD, and recruited the participants from the follow-up study in cooperation with the first author.

### **Struggling with and for**

The parents' main concern was how to handle everyday challenges with the teenagers and how to get the help they needed and required. Their main challenge can be summed up as follows: How to cope with the everyday challenges of ADHD teenagers in the family? The main category, *struggling with and for*, explains how the parents deal with their challenging situation with the help of the subcategories *good "mothering"*, *advocating*, *seeking support* and *giving up*.

The teenagers are identified in three main typologies, as *elf*, *clown* or *bully*, while others may have features from more than one, for example, as *elf* and *clown*, *bully* and *elf*, or *bully* and *clown*. Both boys and girls may have features as *elf*, *bully* or *clown*. The clown does funny things, and acts as a type of Gyro Gearloose. He or she is well liked, and has many friends because they always come up with something strange or funny. Since they are mischievous and come up with so many ideas, both friends and family may become exhausted. The elf is quiet and withdrawn. A typical elf is the quiet and withdrawn ADD girl, who is introverted, has problems initiating, and can be easily overlooked. Both boys and girls had attributes from the elf. The boys are usually interested in computers, and some seem depressed, as they are lonely and have few friends. A last typology is the bully. When the kids were young and the parents picked them up from kindergarten, commonly, other kids told them about something bad that he or she had done that day. The bullies are seen as mean, and the other kids are often scared of them. The bullies are angry and aggressive; they fight, are loud, and initiate unprovoked acts. While the clowns are charming and popular, the bullies are often lonely

and without friends like the elves. Because they push people away by their behavior, both children and adults become scared and worried. The teenagers (*elf, clown and bully*) have immense problems concentrating and initiating, and need to be initiated and followed up in a different way than other teenagers.

### Good "mothering"

Good "mothering" contains these strategies for the parents: nagging, cleaning, follow-up, motivating, supporting, consolidating, facilitating, helping with friends, helping with homework, medicating, controlling chaos, and building structure. The teenagers need support and follow-up in relation to diet, medication, and physical activity. The parents are continuously working on setting limits. One mother told that every night she had to go to sleep at the same time as her 15-year old son, so that he would calm down and fall asleep. The parents describe endless hours of homework help, much more than what is common for teenagers in the same age group. Providing homework help can be experienced as a great burden.

It is sad to see your son or daughter not having friends. When the kids were young, the parents could help to some degree in making friends, by involving other parents, teachers and other adults. Many of these teenagers have younger friends and lack a best friend. This is because they do not understand the social codes completely, and do not see themselves and what they do with others. The parents do everything they can to facilitate and create friendships, but to make friends for others is almost impossible. It is experienced as burdensome and exhausting to always nag, follow-up and watch out for the children. These teenagers with their "invisible" handicap are difficult for others to understand. The parents feel powerlessness and experience a lack of understanding from their surroundings. Moreover, they become tired of nagging. There are almost no limits to how far some parents would go to help and support their son or daughter.

I am there and work for her. You can manage what you want to, you will achieve everything you want to. I am sure you can move this mountain. I have to always work on her self-esteem. Usually you have to lower it down somewhat, but she must be built and built and built. But that is fine - I do that for her.

### Advocating

The support system seems confusing. Parents have to deal with a variety of helping agencies and professionals, everything from school teachers and nurses, to psychological-pedagogical services, child and adolescent psychiatric outpatient clinics, the GP, psychiatrists, psychologists and child protection services. Despite noteworthy exceptions, and a few exceptional and positive individuals, meeting with professional services is experienced as discouraging. Lack of understanding, expertise, continuity, missing applications, and a general mess is common: "No one understood what we were really talking about," "I never met the GP," "Papers are sent back and forth – and then they end up just laying around."

The ADHD parents often experience just as many challenges in the meetings with the professional services as in their relationships with their teenagers. Paradoxically, the

helping agencies that are supposed to support the families are experienced as an added burden. The parents therefore often act as the defense attorney for the teenager. Parents are looking for system cooperation. They often need to fight for their own rights and for those of the teenager. What they want and look for are professional services based on compassion and flexibility. They want helpers who show professional discretion, and they want more practical help. The strategies they use as parents are fighting, nagging, discussing, calling, writing letters and inquiring. The parents experience a lack of following up from the helping agencies, and despair and frustration when confronted with the rules and paragraphs. The consequence is that the parents grow tired of nagging those who are there to help:

What I feel is the most tiresome is that I have to watch that those who are supposed to be doing things are doing it. I always have to call and nag and nothing happens. Always fight. I do not have the rules in front of me but those who ask me do. Sometimes it seems they are asking unfair questions to prevent me from getting what is required.

### Seeking support

We have now focused on the fight of the parents with the teenagers and their fight with the professional services. Frustrations and challenges are common, but also help and support from professionals and from their own network. The parents use the following strategies to seek help: being open about difficulties, using their own network, sharing experiences, and fighting for relief. Different things are helpful for the parents. Usually, it is about reasonable, wise and well-meaning individuals, whom they can trust, who can communicate and listen, and who are able to show discretion. Helpful relationships are of great importance. Parents wish that the teenagers can meet supportive adults. This is often about good flexibility, discretion, and continuity. A mother told about an opportunity to use user-driven assistance tools to pay her, instead of bringing strangers into the house. It was also possible to use these means for someone to clean, so that she could spend her time with her son.

It is not always easy for the surrounding social milieu to understand what type of challenges these families have to face. For that reason, they do not always receive the necessary support from family and friends. It is often easier to gain understanding from other ADHD parents and parents of children with other disabilities. Many speak about good support from trainers in sports teams and from foster parents. It often pays off to be open concerning the issues with the parents of classmates. Many parents are divorced and experience support and relief from their ex-partners. Many benefit greatly from foster parents and relief on weekends, especially on farms with animals:

We get to take a break one weekend each month. They have a small farm, and she enjoys being there. 'Mom, when you die, I will move there!' They have lots of dogs, chickens, sheep, rabbits and all kinds of animals, just great!

### Giving up

Several parents of ADHD-teenagers are single mothers. Many are divorced with a new partner. Only two teenagers in the study lived with both biological parents. This may suggest that many marriages in families with ADHD kids are broken because of the strain

and burdens in the family. The strategies used by the parents in this category are: divorce, react destructively, and boycott. Aggression and despair is common, which in many cases lead to escape, separation and divorce. Some speak of violence and abuse, and in many cases, the child protective services are involved. Earlier, we mentioned that ex-partners can be supportive, because they can contribute to relief. The relationship with ex-partners can also be demanding, because they and their new partners may boycott the correct diet and medication. Moving between homes and visiting parents with new partners and families can also be challenging, and are experienced as insecure for these teenagers, who more than others need a stable environment.

## Discussion

The parents' main concern was how to handle everyday challenges with the teenagers and how to get the help they needed and required. The main challenge can be summed up in the following way: How to cope with the everyday challenges of having an ADHD teenager in the family. *Struggling with and for* is the main category. The parents of teenagers with ADHD fight a daily battle with the teenagers but also with the helping agencies to ensure the rights of the teenagers and themselves. When they struggle with and for, four different sub-categories are used: *good "mothering," advocating, seeking support and giving up*.

The teenagers in our study are identified as three main types – *elf, clown and bully*. These typologies are not comparable with the ADHD subtypes of inattention and hyperactivity-impulsivity, but rather a mixture of ADHD symptoms and symptoms of other disorders such as ODD, anxiety, autism spectrum disorders, and associated developmental problems. This finding is in accordance with studies that point to the high proportion of children with ADHD who present with several comorbid conditions (Barkley, 2006; Brown *et al.*, 2001; Gillberg *et al.*, 2004; Steinhausen *et al.*, 2006; Reiersen & Todd, 2008).

What I find most difficult is to distinguish what is what. What is ADHD? What is Tourette's? And what is teenage defiance? And then you have the third, Asperger's. It is not easy.

Because of the mixture of diagnoses and associated problems, many parents find it difficult to know what would be the best treatment and care for their children. For the parents, the diagnosis was not the most important aspect, but how to handle the multitude of daily challenges related to their child and family life. The challenges and the mastering strategies that our informants use match earlier qualitative research. A recent Norwegian study describes the parents' despair and sorrow, coping and hope, interacting with the social network, and dealing with people who are supposed to help (Moen *et al.*, 2011). The parents compare the child's receiving of the ADHD diagnosis to a grieving process. This study also focuses on the parents' ongoing struggle with the helping agencies, which is a main finding in our study as well. ADHD doesn't show outside. "Interaction with the network and professionals felt cumbersome and as such, became a burden." (Moen *et al.*, 2011, p. 447). In a Swedish study with parents of teenage daughters with ADHD the parents' situation was conceptualized as *living at the edge of one's capability*, with the properties: having the sole parental responsibility, fighting for professional support, being on duty around the clock, and trying to solve family conflicts (Hallberg *et al.*, 2008). These findings correspond in particular to our findings *good*

"*mothering*" and *advocating*. This study also focuses on the high level of stress and conflict that often take place in these families. Many ADHD parents live as single parents, and thus have an extra parental responsibility (Hallberg *et al.*, 2008).

Some American studies present and discuss different family management styles: chaotic family, ADHD-controlled family, surviving family, and reinvested family (Kyle, Conlon, Strassle, Vinh & Trout, 2008; Kendall, 1998; Kendall & Shelton, 2003). The chaotic family is characterized by extreme stress, little internal and external support, and often overprotection, violence and other maladaptive parental behavior. The other management styles seem healthier and more functional. Kendall & Shelton (2003) suggest that the ADHD-Controlled family, the surviving family and the reinvested family could be viewed as a trajectory. "Where a family was located on this trajectory could be viewed as a function of the age of the child with ADHD and the length of time since diagnosis." (Kendall & Shelton, 2003, p. 278). Only one or two families in our study might suit the chaotic family management style. We agree that family management styles might be viewed as a trajectory. This also corresponds with the child's receiving the ADHD-diagnosis as a grieving process (Moen *et al.*, 2011). Parental management styles tend to correspond with the severity of the child's symptoms and the amount of support from the social network and the professionals.

As mentioned in the introduction, Lazarus & Folkman (1984) have identified two major groups of coping strategies: efforts to alter the cause of the stress (problem-focused coping) and efforts to regulate the emotional responses to stressors (emotion-focused coping). The problem-focused coping may include active problem-solving and aggressive interpersonal coping. Emotion-focused forms of coping involve strategies such as denial, detaching from the demanding situations, or blaming oneself for the problems (Lazarus & Folkman, 1984). In the light of coping research (Lazarus & Folkman, 1984; Judge, 1998), our categories *good "mothering"*, *advocating*, and *seeking support* are mainly problem-focused and include active problem-solving. As found in other studies (Bailey, Barton & Vignola, 1999), most parents used problem-solving coping strategies such as rational problem solving and seeking social support. *Advocating* might also involve aggressive interpersonal coping, when struggling with the helping agencies and professionals who don't seem to understand or seem unable to help. The category *giving up* is more emotion-focused. We would like to add, however, that emotions are also important for the parents' motivation and willingness to keep on fighting and struggling (*good "mothering"*). The parents seem to appreciate wise and well-meaning professionals whom they can trust, who can communicate and listen, and who are able to show discretion, are sensitive and understanding, problem-focused and emotion-focused. These parents experience an extreme amount of stress in their family life. It is understandable that their coping strategies include; problem-focused coping, aggressive interpersonal coping and emotion-focused coping depending on the child's impairment and support from the professional services (Moen *et al.*, 2011; Kendall & Shelton, 2003).

In this article, we wish to emphasize in particular the parents' struggle with the professional services. It is remarkable, and a great paradox, that the struggle with the support services can be experienced almost as intensely as the daily struggle with the teenagers. Similar findings are also reported in other qualitative studies with parents of ADHD-children (Hallberg *et al.*, 2008; Harborne *et al.*, 2004; Moen *et al.*, 2011), by parents of disabled children (Brinchmann, 2005), and by family members of home ventilator patients (Dybwik *et al.*, 2011).

### Limitations and strengths of the study

Many qualitative studies recruit the participants from parent associations (Moen *et al.*, 2011) or by advertisements (Hallberg *et al.*, 2008). One strength of the present study is the recruitment of parents from a follow-up study of children from regular child psychiatric outpatient clinics. All children except one fulfilled the parent-rated symptom criteria of ADHD Combined type, and all children were medicated for their ADHD symptoms. We haven't found similar studies on parents of hard-to-treat ADHD teenagers. However, the families were all native Norwegians, and they lived within a restricted geographical area in the middle of Norway.

The first author is the parent of an adult with ADHD. This information seemed to inspire the informants to open up, as the researcher was not only interested as a researcher or a professional, but also had experience as a parent. Combining the role of researcher and parent might cause problems, because personal experiences might lead to biases. We would consider this more problematic if she had had children at the same age as the parents in our study. The second author participated in the analysis, to manage possible researcher bias. The findings were also presented at national and international research conferences, and received good feedback from professionals who know the field and the issue.

### **Conclusions**

The informants in our study often experienced just as many problems with the helping agencies as with their teenagers. The professional services that were supposed to support the family were seen as an added burden. The parents experienced that they had to act as the defense attorney for the teenager. They sought out cooperation with the system, and had to fight for their own rights and the rights of the teenagers. What they wished for and sought out was a support system based on compassion and flexibility. They wanted helpers who showed professional discretion and they wanted more practical help. The mastering strategies of the parents were fighting, nagging, arguing, writing letters, and seeking out. However, the picture was not all dark. The parents also told us about different things that were helpful to them, including the reasonable, wise and benevolent individuals who they could trust and who could communicate and listen and use discretion. Some informants spoke about helpful relationships and how they wished that the teenagers could meet these supportive adults. This was often about their flexibility, discretion, and continuity.

### Implications for the clinics

The parents' experiences with the children's core symptoms of ADHD combined with additional difficulties and comorbid conditions underline the need for differentiated and tailor-made treatment options. Children in need of long-term comprehensive and coordinated health and social services are in Norway entitled to an Individual Plan and a service provider or coordinator with responsibility for following up the Individual Plan. The parents evaluated many single professionals in a positive way, but at the same time, they experienced professional services that were not coordinated. Based upon the

parents' experiences, an individual plan combined with motivated and responsible coordinators seemed to be important for most parents who participated in the study.

As found in other studies (Bailey *et al.*, 1999), most parents used problem-solving coping strategies such as rational problem solving and seeking social support. It is important that professional helping agencies are able to identify family strengths and capabilities. In that way, professional support can be built upon coping strategies with which a family is already familiar.

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### **Competing interests**

The authors declare that they have no competing interests.

### **Authors' contributions**

Both authors were responsible for the study conception and design. The first author performed the data collection, and drafted the manuscript. The first author was responsible for the primary analysis of the data. Both authors participated in and discussed the analysis of the data, and made critical revisions to the paper for important intellectual content. Both authors read and approved the final manuscript.

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## **Marshaling Resources: A Classic Grounded Theory Study of Online Learners**

Barbara Yalof, American College of Education and Harcum College

### **Abstract**

Classic grounded theory (CGT) was used to identify a main concern of online students in higher education. One of the main impediments to studying online is a sense of isolation and lack of access to support systems as students navigate through complex requirements of their online programs. Hypothetical probability statements illustrate the imbalance between heightened needs of virtual learners and perceived inadequate support provided by educational institutions. The core variable, *marshaling resources*, explains how peer supports sustain motivation toward successful program completion. Understanding the critical contribution virtual interpersonal networks make towards maximizing resources by group problem solving is a significant aspect of this theory.

**Keywords:** Online learning, e-learning, personal learning networks, peer networks

### **Background**

Online programs present a particularly appealing alternative to face-to-face programs in higher education as economic realities force more students to retain employment to pay for spiraling costs of education. The economic potential of the growing online market has not been lost on institutions of higher learning. Traditional programs have struggled to sustain a viable student base, but they can increase their numbers through the addition of national and international online students (Appana, 2008). In 2012, enrollment in online courses grew 9%, with the proportion of students enrolled in online courses at 32%, an all-time high (Allen & Seaman, 2013).

In light of the continual growth of online courses it is particularly alarming that attrition in online programs can exceed that of traditional programs by 10-20% (Allen & Seaman, 2010). Not only do students who leave an online program forfeit learning opportunities, but the institution also suffers lower enrollment, thereby imposing financial strain and reducing the vibrancy of the student body. Sustainability of programs in higher education relies heavily on recruitment of student populations who complete their programs and conclude that their academic experience has been a worthwhile investment (Gittings, 2010).

Empirical studies have not explained sufficiently how institutions can reduce online attrition (Kember & Leung, 2009; Tinto, 2012). Kember (1989) recognized the need to generate theories that explain attrition from online programs. He maintained that it is difficult to draw conclusions because the number of constructs in this substantive area is

“unwieldy if not unmanageable” (p. 279). The use of CGT provides the writer a greater understanding of the “motivational drivers” (Glaser, 1998, p. 32) of a particular group of participants. Discovering the main concern of online students through the systematic application of GT methodology draws into focus the dominant psychological coping mechanisms of online students.

### **The Theory of Marshaling Resources**

The main concern for online learners distilled from this study is a feeling of disconnect or isolation, which may manifest itself as panic or anger, when confronted with a barrier to success. Because studying online is accomplished in a solitary virtual environment, students interact with the computer and must be able to navigate the learning management system and engage with the material in the absence of peer support. As learners progress through their programs, they find inconsistencies between their own expectations and needs and their online educational environment (Kiliç-Çakmak, Karatas, & Ocak, 2009). Glaser (1978) discusses how people position themselves (in this case, for success) by purposefully managing others. Students learn how to maximize resources and reduce frustration by building peer connections. As groups progress from mutual dependency to reciprocity, trust builds, and relationships deepen. Harnessing the power of this safe haven they have created online, students vent and reinvigorate. Marshaling resources illuminates how and why people find camaraderie when they need to feel a stronger sense of connection.

Given the promise of grounded theory to analyze patterns of human behavior in a systematic manner, I conducted a study around the grand tour question “Please talk about your experience as an online learner” to develop a theory that would provide a “theoretical foothold”(Glaser & Strauss, 1965, p. 268) into understanding problems that confront online students. What issues contribute to the high rate of attrition? Data were coded and compared and relationships between concepts analyzed to reveal several hypothetical probability statements to explain patterns of behavior problematic for participants (Glaser, 1978). The processes of constant comparison analysis (CCA) of data (Glaser, 1965), concurrent theoretical sampling, and the researcher’s theoretical sensitivity were the tools used to guide the emergent theory (Holton, 2010). Theoretical memos served as the basis for comparison and were written by the researcher “*as they strike the analyst while coding*” (author’s italics) (Glaser, 1978, p.83).

Information was gathered from 18 undergraduate and graduate students in 14 online colleges. These participants administer, counsel, and teach in online programs, and provide divergent perspectives on pertinent issues. Theoretical sampling guided the choice of participants. In order to saturate categories, I chose participants who are satisfied with their programs, who had been extremely frustrated at some point, and who had dropped out. Information from experts was solicited and discussion groups of online learners in professional learning networks were examined and coded for relevant information to provide a well-rounded view of the current state of online education (Glaser, 2007).

Marshaling resources highlights the power of social networking to fend off isolation and to create a network of like-minded peers who together solve problems that seem

unsolvable alone. The ability to trust others from afar transforms the learner's experience of aloneness into one of powerful bonding. Marshaling resources includes the interrelated indicators of *mattering*, *teaching ambience*, *navigating emotions*, *tipping point*, *breaking off*, and *replenishing*.

### **Mattering**

A nurturing presence, be it human or spiritual, is crucial to success in online learning. Online students may never meet anyone from their college, yet they want to believe they matter and what they are doing has value. Learners realize they may need to create a system of support, as they find the educational institution is unable to provide for all of their needs. Many develop a group of people who at first care about the same thing and then learn to care about each other; sometimes very deeply. Properties of mattering are sustaining motivation, practicing expertise, virtual invisibility, and connecting virtually.

As a group coalesces, members form an emotional scaffold during stressful times. Peer networks eliminate isolation and associated feelings of anger and depression that occur if progress is thwarted.

Mattering applies also to the belief that the work accomplished in the online program will be beneficial for future employment and merits the significant hours of work involved. Coursework that complements practical skills is inherently motivating. One respondent notes "when assignments include freedom to use class assignments to enhance my employment skills, I feel that I am really learning and wanting to be there." When coursework does not offer immediate application to work, students turn to peers to sustain motivation and enrich learning through socialization.

Students enhance the creation or building of their own support systems through practicing expertise. Oftentimes, they provide information to peers in a quasi-teaching role, thereby enhancing their own feelings of self-worth by sharing their skills. In the online classroom, a more informed peer scaffolds a less knowledgeable peer by interpreting what is going on. This allows one person to lean safely on another without fear of being judged. These roles can reverse at any time, as tutoring relationships become the basis for personal relationships, which in turn become part of a support network. In this way, particularly in classrooms with low teacher presence, online students enlist others to make sense of assignments and achieve mastery over material. In turn, they reach out to help others as they internalize the power of reciprocity. Benevolent behavior helps people form friendships, which lead to co-building knowledge and teamwork (Knowles, 2008). Eventually, if mutually desired, repeated exchanges lead to a more intimate personal involvement. It is important to note that most of these group members never meet, yet are described as "family".

Without the benefit of face-to-face interaction, problem solving is more complex and can contribute to virtual invisibility, a feeling that, because you cannot be seen, your request can go unnoticed or ignored? One participant with a dual role as online teacher and student remarks how easy it is to ignore an online student in need. Those who study online

usually have time-sensitive issues, and stress compounds as time passes and nothing is resolved. A participant notes, "Once I get angry, I am wasting my time when I should be working."

It is relatively easy to mitigate these negative feelings. Data show that a simple act of a quick, personalized reply is effective in alleviating negative emotions, which begin to swell when people feel ignored. Relationships help redefine an isolating environment into a more nurturing one. Connecting virtually to others is a powerful motivator, as participants speak of not wanting to let down the people who believe in them.

### **Teaching Ambience**

Encouragement from one who cares serves as a motivator for online students. The course instructor, though not visible in a corporeal sense, provides the teaching ambience, which directly affects course effectiveness and student satisfaction. A participant compares course experiences with a peer who had a different teacher in this same course. The peer teacher is warm and nurturing, while the other is non-responsive. The participant's desire to continue online studies is revitalized after a course with a teacher who appreciates and shares her sense of humor. Data show many times it is the course instructor who guides the student back into the class and makes the most important contribution to student success. Properties of teaching ambience are feeling lost, rubric reply, and positioning to share.

Instructor absence contributes to a sense of feeling lost in the online classroom. Data reveal this: as online teacher presence decreases, student struggle increases. Controlling class is a property of teaching ambience that attributes skill and willingness of the instructor to provide timely, constructive support and structure to student success. Without a visible and competent instructor presence, participants are susceptible to losing interest easily. One participant remarks that she sometimes feels as if she is her own teacher, and she has a grader who passes judgment, and she is not sure if she is learning.

A learning environment ideal for constructing knowledge provides parameters for mutual respect and makes students feel safe to express themselves. In the absence of a strong teacher presence to enforce rules and classroom structures, numerous concerns arise. Participants note problems interpreting assignments and intense "unmonitored arguments among students." Indolent peers might create annoyances, while other vocal students participate in arguments that derail learning through learner disengagement. This study corroborates research by Cull, Reed, and Kirk (2012) who note that chaos that can ensue without supportive presence of a knowledgeable instructor. This presence is essential to student intellectual growth and emotional stability; it stabilizes the group, and prevents flare-outs that derail learning.

Rubric reply is a response that comes from a teacher in the form of feedback that lacks personalization. Many times comments are made and grade deductions are taken without specifics of how to improve their work. Data show assignments are difficult to

interpret and seem vague, and students feel they must tiptoe softly rather than ask for clarification.

Online students can be nurtured by fellow students and in turn may nurture, but prefer to choose whom they nurture. Positioning to share is an aspect of the teaching environment as it informs classroom ambience relating to collaboration. The majority of online students do not want to collaborate, and view the forced collaboration of the online environment as impeding their learning. Certain conditions must be met in order for these students to build a mentoring relationship. They must possess a certain level of need for the relationship in order for them to engage. One participant says she understands that collaboration is “supposed to be a growth experience,” but does “not want to end up doing the extra work involved when folks do not live up to my standards.” High functioning online students are frustrated by the apathy of students who are supposed to be fellow collaborators. Eventually, foundering but motivated students gain confidence, and are welcomed as group members. The desire to build connections may begin in collaborative groups if potential members are identified by their positive response to nurturing.

### **Navigating Emotions**

Navigating emotions involves the skill of the online learner to progress through complex learning management systems and degree requirements without letting negativity become overwhelming. Online students often encounter situations or emergencies, and students may think of dropping out if they encounter rigid authoritarian policies and attitudes. Remaining flexible is a property of navigating emotions. Online learners suffer less when institutions are flexible, and data revealed this to be contrary to the case in many situations. Navigating emotions is characterized by tiptoeing softly and relinquishing control.

Tiptoeing softly involves not wanting to stand out as a complainer. In instances that do require clarification and support, online students try to finesse communications with those who are in a position to judge their work. One student describes a situation where she had misunderstood an assignment and received a poor grade, “Although I felt that it was her responsibility to provide remediation for me, you don’t want to alienate.” Online students often feel they have been wrongly judged, yet do not believe the fight is important enough to risk losing the teacher’s good graces.

Relinquishing control applies as online learners reflect on the emotional turmoil of feeling misunderstood. Relinquishing resistance by continuing on despite these feelings, they are able to let negative comments go. One participant was unable to do this and was affronted by every perceived slight to her intelligence. The student was infuriated by not being able to challenge the teacher face-to-face and point-by-point. She ultimately left her program, feeling she could not control the situation from afar. Participants speak of seeing online chats become filled with angry rants. Few noticed angry comments within the classroom discussions; most negative comments were posted on the chat boards not seen by those who had the power to assess their performance. Students who develop trusted peers with whom they share are not likely to flame out in this way.

Many comments on chat boards are posted to receive support, be understood, and be heard. One student on a chat group I coded declared that she was finished; she has had enough. She received so many supportive replies in response to her cry and saw how much her trajectory towards program completion mattered to peers that she was mollified. Today I received a Linked In request from her with the much-desired "Dr." in front of her name.

### **Tipping Point**

A tipping point is reached when a solution to a problem does not appear to be within easy reach. Pressure and turmoil increase as unmet needs begin to outweigh support provided by the institution. Feelings of isolation and anger ensue. The very issues that caused others to flounder do not particularly disturb many participants. A tipping point occurs when the status quo alters and expectations or protocol undergoes a transformation. Policies that are changed midstream may force people into tighter deadlines or situations they are unprepared to accept. Subsequent points of frustration occur where systems of support provided by more structured environment give way to more independent projects. Lack of a strong teaching presence or poor responsiveness of the teacher causes stress that may be unbearable. Judgments passed in harshness, if not accompanied by a remedy or remediation, push online students to feel unsupported and they may flounder.

### **Breaking Off**

Too much stress and harsh judgment may cause a sufferer to think about abandoning his or her efforts towards a goal. A high level of stress is associated with online students' unmet needs. Students may feel ignored, invisible, and angry. These emotions precipitate a critical juncture (Glaser, 1998) characterized by thoughts of breaking off. Online learners assess the cost of failure (Scott, 2007) and may begin to look for help. Students who proactively search for resources (marshal) are in a better position to continue efforts to reach their goal.

Marshaling resources is a skill that can be developed to avoid getting emotionally "dragged under" by perceived lack of support. Online students who have positioned for success have taken responsibility for organizing their own system of support. They may have a clearer picture of how to move forward, and do not face the lethargy that isolation may engender. Students who study online must master both program material and their emotions to move smoothly through a curriculum. Support from their peer group empowers both of these areas.

### **Replenishing**

When emotional scaffolding is in place, energy is replenished by sharing and venting. A safe place to release stress reduces the chance of anxiety becoming overwhelming and unremitting. Students can be re-energized and reinvigorated even by small gestures of

consolation. Teachers have power to instill a positive attitude in students through personalized feedback. A change to a different instructor can revive a student's interest in a class in which they struggle. Properties of replenishing are deepening faith and forging alliances. One participant discovers that she was in the same class as a new acquaintance, but with a different teacher. She shares this insight:

Teachers interpret the same parameters of each class differently. They each had the same rules from the school but I discovered over the course of the program that they used a lot of flexibility in how they interpreted the rules. From this I realized that not all teachers are the same, and she had a great teacher. Although the course itself was exactly the same as mine, she was having a great experience.

What was the difference? Kindness and caring are powerful motivators. Both participants in the study and students who contribute personal comments to the chat boards attest to the importance of locating caring instructors and advisors because these relationships provide the sustenance they need to continue.

A property of replenishing resources, deepening faith involves a way other than peer support that online students find emotional scaffolding to resolve problems. While some students have already assembled the rudiments of a virtual social network, others receive spiritual strength from belief in a higher power. They are able to deepen their faith in response to stress. As faith gives strength, so faith is strengthened. This cyclical process describes the power of faith to heal anger and help people find a path out of difficult situations. Those who have deep faith believe their struggles will resolve itself. The cyclical nature of deepening faith involves both trust in oneself and faith in a higher power. Faith empowers the individual and provides self-perpetuating relief from aloneness and stress. Connecting with spiritual feelings also creates powerful bridges from invisibility to visibility and from despair to hope. Forging alliance with peers provides strong support to those who require a two-way communication. Through faith and from peer support, students find a willingness to endure that persists despite the realization that concessions may be necessary. People decide that failure is not an option and push through barriers to achieve a goal.

## **Discussion**

The theory of marshaling resources addresses the critical need for new theories to guide the emergent field of online learning (Kember & Leung, 2009, Saba, 2011). Saba (2011) noted the absence of theory in studies conducted using only the requirements of quasi-experimental research. The theory illuminates the various ways that online students of different temperaments respond to a common concern, which is the isolation and helplessness in the face of perceived lack of available institutional resources. It is not necessarily a linear process, as the level of neediness varies with each student, as does their ability to marshal support from capable sources. The more support students perceive is available, the fewer resources, both personal and psychological, are required to sustain the persistence effort. Imbalances between needs and supports provided by the educational institution can diminish student retention.

The theory indicates development of strong systems of support is a mostly student driven phenomenon, despite the fact that human connection is an essential component of learning online. Certainly, not all online courses contain the same requirement for social

interaction. Not all students share the same propensity for learners to want to interact online. Scott (2007) makes the point that inopportune circumstances such as differing schedules or time zones increase complications for online students. People with a highly developed personal commitment styles may thus be thwarted in their attempts to fulfill all requirements of collaborative projects in a timely manner. They may also experience extreme frustration feeling the pull of wanting to have the work completed on time but not having all of the pieces in on time.

On the other side of the collaboration discussion, data from this study show strong desire to build and lean on relationships with other students. The process of marshaling resources can also increase passion for learning through the process of co-creating knowledge. The concept of collaborative creativity, as Scott (2007) mentioned, aligns with marshaling resources because it illuminates how a shared learning experience can positively transform a student's perception of online learning. Participants who were active members of an online support group credited the group with not only intellectual stimulation but also emotional support to continue to completion despite obstacles.

The same positive emotional response holds true for students who develop virtual relationships with faculty or staff members. Rather than cutting off potentially rewarding relationships with teachers who could assume mentorship roles, participants want colleges to help them develop these relationships. Unfortunately, many institutions do not appear to value the student-to-staff connection and frequently change staff assignments. One participant relates this after months waiting for a helpful response from her unresponsive designated chairperson:

I put in a request for a new chairperson. Then I was blessed with getting the chair I had asked for in the first place. This chair was excited to have me, not like the first chair. We were equally excited to work together. I had had her as a teacher and we had clicked. We just seemed to click through e-mails, and discovered a similar sense of humor.

Replacing the student's unresponsive chair allows her to reevaluate her belief about the responsiveness of her college to her needs and re-energizes her dissertation journey. The action of the college transforms a disgruntled student into a successful graduate.

### **Implications for Practice**

Marshaling resources conceptualizes how unmet student needs might cause one student to consider dropping out and another to be empowered by the experience in order to move ahead. Probability of success is related directly to availability of institutional resources and ability to expend psychological resources to receive help. Online learners believe that the outcome of their situation depends on how flexible and supportive the institutional staff is willing to be. The fundamental message provided by online learners in this study is a deep concern that many of their needs, and the needs of their fellow students, are not met.

Successful online students recognize they must act to build their own supports if they become disengaged or encounter trouble that virtual invisibility might engender. Through building relationships, they generate new resolve and this determines whether their path is

one of attrition or completion. Peer networks provide more emotional support than a teacher who does not create a strong presence. Importantly, online peer groups are able to transition from social discourse to cognitive support, and back again.

It is important to understand better the role of collaboration in online classes. Increasingly, accreditation agencies require colleges to utilize these types of so-called knowledge-building activities in their online courses. Students who cannot choose their teachers or mentors bristle at enforced peer collaboration. Participants clearly want to choose with whom they are going to be working and have a good idea about with whom they do not want to collaborate. High achievers do not wish to learn from or with those who are not driven to learn. In order for collaboration to work, motivation to learn and share must come from all parties, and clear parameters for group work requirements should be enforced.

### **Developing Ability to Marshal Resources**

Marshaling resources by building community can involve a transformation from being a taker of information to being a giver, and can deeply enriched the experience of those who participate in the exchange (Holton, 2007). While it is true that individuals possess finite resources, each person has the capacity to marshal resources thereby enabling him or her to maximize resources by employing a learning-support group to solve problems. Some individuals know instinctively who is a nurturing presence and whom they wish to befriend. Many individuals go out of their way to assist others and are happy to do so.

### **Fit for other Substantive Areas**

To heighten appreciation of the issues underlying high attrition in online programs, the present study was conducted using a classic grounded theory design (Glaser, 1965; 1978). This grounded theory study provides more than an explanation of the experience of online students. Online students may have more at stake than other groups of people; yet, the theory applies to those who struggle to maintain forward momentum as they navigate complex systems in today's society. The theory generated can be applied to people who find themselves in untenable situations or who face unsolvable problems alone. It explains how resiliency is found within from marshaling and accepting strength from others. Understanding the critical importance of personal networks to problem solving is a central component of this theory. Successful online students are able to discover and cultivate sources of support not readily apparent to all students.

Marshaling resources can be applied (Glaser, 2002, p. 8) to help institutions in order to understand how to retain a greater number of students by ensuring their emotional needs are met. Because grounded theories are abstracted from time, place, and from specific groups of people (Glaser, 2001), the theory should have fit and grab (relevance) to other substantive areas (Glaser & Strauss, 1967). The need to secure alternative sources of support relates to people who struggle in all circumstances. Without the stability provided

by a source that is readily available to provide support, people cannot or are not able to progress forward.

Ideally, people should cultivate resources and have them in place before a tipping point occurs. Marshaling resources may help individuals and institutions realize the importance of developing networks of support early in the process of obtaining a degree online or any other goal that involves extreme effort. In this networked world, connections made during the time in college or graduate school can foster the formation of learning networks that serve one well during employment (Siemens, 2008). Participants who are able to make meaningful connections while studying online find added value to their educational experience exceeding merely classroom learning.

Categories such as forging alliances and deepening the faith describe the unrelenting efforts of participants who are driven to succeed. These concepts have fit and grab (Glaser & Strauss, 1967) for those who struggle and refuse to give up despite the effort and sacrifice involved. The theory marshaling resources is generalizable to the greater community (Glaser, 2001).

### **Contribution to the Body of Knowledge**

Marshaling resources theory supports and extends the research conducted by Holton (2007) by providing additional insight into how a cohesive trusting group enables students to sustain interest in online learning. Holton's (2007) grounded theory, *rehumanizing knowledge work through fluctuating support networks*, highlights how people motivate each other. "Individual passion for learning is stimulated and reinforced in a network. There is a strong sense of collective wisdom . . ." (p. 37). Holton describes reciprocal learning as ". . . getting past disengagement . . ." (p. 37). When online learners interact with caring members of an online cohort, the way in which they acquire knowledge and their willingness to support fellow members grows exponentially.

Marshaling resources also affirms the studies of Gatin (2013) and Shea and Bidjerano (2009) whose studies both enrich understanding of the online student. Gatin (2013)'s theory *keeping your distance* sheds light on why some online students struggle with enforced collaboration, yet may find their own group a safe and motivating environment. As people begin to feel that their knowledge helps others, so their own cognitive progress is stimulated (Shea & Bidjerano, 2009; Vygotsky, 1978).

A combination of tenacity and emotional intelligence (Goleman, 1997) work together to facilitate people's ability to engage others' help when supports provided by the institution do not satisfy their needs. Through marshaling resources, people seek and create support systems. It is outside the realm of this study to investigate the role of emotional intelligence in marshaling resources, but is an area that other researchers may wish to pursue.

The contribution of this study should be tempered by its limitations. Although the theory seems to fit for other substantive areas, data resides within the online learning

arena. Empirical validation of concepts illustrated in this theory could be investigated in other areas where individuals experience difficulty having their needs met and may be prevented from attaining goals or receiving help they need.

As Simmons (2011) aptly noted, "You are unlikely to attain your 'what ought to be' unless you have a clear, accurate understanding of 'what is'" (p. 3). Marshaling resources can be applied to explain not only how to prevent student problems, but also to address what institutions of higher learning can do to prevent student dropout or transfer. More research is needed to test substantive theories based on current empirical situations in online learning and thus shape the teaching practices and policies in the evolving field of online learning. Additionally, more research into the value of personal learning networks as emotional scaffolding would test the theory's relevance and fit to other substantive areas.

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## **Trenchant Remedying: Directional Disturbing of Organizational Change Effort**

Jan Green and Ben Binsardi, Glyndŵr University

### **Abstract**

Organisational change theory has a historic bias towards personal resistance and individuals adopting a passive or negative perspective to change initiatives. Perpetuating this view change literature presents management approaches to assist in overcoming resistance, which have shown negligible evolution beyond the view that individual involvement and participation, together with effective communication, provide assistance. This paper challenges this assumption by providing inspiration via a contrary conceptual approach to organisational change; proposing an antithesis to traditional change management solutions and contributes to the role of communication within the process of change management. Grounded theory is the methodology used, which enables the data to provide the concepts and connections required in the construction of the theory. This requires a no preconceptions dictum to enable the generation of theory, not verification of a previous theory or hypothesis. *Trenchant remedying* is the grounded theory generated from data and conceptualises the concern resolving behaviours undertaken during the change receptivity process. During analysis it became evident that vigour and effort were expended and a solution sought as a remedy, hence the naming of the core category.

**Keywords:** change receptivity, change initiation, alertness, disruption, effort

### **Introduction**

In order to illustrate the on-going request for inspiration regarding change, it should not be unexpected when a practitioner comments about the complexity of issues that arise during the process. Actions taken in attempting to reach solutions that can subsequently be implemented are sought. It is timely that change, as an organisational issue, is still subject to extensive debate and question.

The decision to undertake organisational change is usually arrived at in order to make a difference in an area of the business, typically because established measures demonstrate a variance on past performance against predictions. The most frequent change catalysts focus on performance measures such as profit margins, sales values, return on investment, increased overheads, wastage, complaints and quality, amongst others.

Seeking inspiration to tackle the hidden assumptions of change is refreshing; this paper strives to conceptualise the concern resolving behaviours that are practised and communicated when a change situation is required. This is done in the absence of

reference to previously developed change theories to comply with the grounded theory methodology, an inductive approach with no predicted outcome in the form of a hypothesis. Previous work is drawn on to strengthen the empirical findings through the provision of a conceptual framework, however it and is delimited to include only literature with conceptual relatedness to the emerging concepts of the generated theory.

### **Structure**

This paper is structured into sections, beginning with a brief commentary related to the methodological approach followed by the grounded theory of *trenchant remedying*. The next section draws conclusions and refers to conceptions drawn from the literature and then presenting directions for future research. The unit of analysis is the individual to identify behaviours of relevance to the area of concern.

The source of influence is a response to a "call for greater academic and management attention to volition as the vital source of individual action and, therefore, of corporate performance" (Bruch & Ghoshal 2004, p. 82). Change initiatives frequently originate as a result of performance changes so it is a logical step to establish whether volition supports the management of change receptivity in efforts to redress the identified change.

The objectives of the study are to identify effective change concern resolving behaviours practised by individuals in private-sector businesses. These are achieved by presenting a grounded theory of successful change receptivity practices and endorse, or possibly modify, the generated concepts within the theory. Literature drawn from bodies of knowledge including and beyond organisational change is used, to represent and enhance the emergent data patterns prior to commenting on areas for further research.

### **Methodology**

Regional business networking events provided the sample source, as audiences, representing a wide range of business sectors, attended functions where the theme was performance improvement. The overwhelming outcome was that change of varying degrees was required to support this requirement. This ensured that an early element of "you're socializing me" (Glaser, personal communication, 12 September, 2011) had already taken place with the respondents within the broad theoretical area of the study and identified the presence of a problem. Adopting this approach assists greatly in accessing a receptive theoretical sample for the study and utilised one of many benefits that resulted from attendance at a Grounded Theory Troubleshooting Seminar!

Four initial conversations lasting approximately one hour took place in order to provide a forum where the respondents relayed behaviours, related to change management issues that were being attended to in order to make a difference to organisational performance. Following each conversation the data was fractured and subject to initial coding in order to undertake constant comparison with subsequent data sets. Following these conversations a sense of behaviours to support change was evident and enabled subsequent shorter conversations, totalling 16 to be delimited before returning briefly to the original four and achieve theoretical saturation.

Recognising that grounded theory is a general methodology that can be used with any type of data and has the ability to intersect across alternative research methods through conceptualisation (Glaser, 2013) sets broad parameters for potential research. These parameters simply require a problem (Binsardi, and Green 2012) that are widened further when incorporating the perspective of those involved in seeking to solve a problem through the understanding of actions - whilst actively applying personal "mental boxing" (Green and Binsardi, 2014) to remain neutral. In order to generate a grounded theory empirical data is collected prior to the searching and reviewing of the literature with a view to supporting theory generation, rather than a verifying approach of previous works. This ensures the eventual grounded theory is not "someone else's theory" (Kenealy, personal communication, 22 February, 2011). By adopting this outlook the outcome should be a wedge of feasible, representative theory that is in accord with what emerges from the data and eliminates the reliance on earlier commentaries (Glaser, 2012). To ensure this is the outcome tolerance and the management of ambiguity, requiring the suspension of preconceptions (Glaser, 2011a) becomes an integral part of the process.

Several definitions of grounded theory are provided in the literature. One is that grounded theory "is a direct, simple inductive method to generate conceptual theory from research data". (Glaser, 2009, p. 5), that depends on the data collection, interspersed with analysis. At all stages "the illustration and example are from the data provided, for the purpose of establishing imagery" (Gatin, 2013, p. 10).

According to Evans (2013) the fundamental tenets of grounded theory are constant comparison, theoretical coding, sampling and sensitivity. Tan (2010) adds memo writing in order to formulate and revise the theory throughout the research process, which is, flexible and creative in order to achieve "the canonical status" (Hendriks & Sousa 2013) that grounded theory is acquiring.

Grounded theory requires entry to the field at an early stage (Goulding & Saren, 2010), in order to collect data about the phenomena to be modelled (Berry, Godfrey, Holt & Kasper, 2013), via a conversation using a source that is most likely to provide early insights (Goulding, 2009). This data set is then coded on a line-by-line basis in order to establish categories within the data (Glaser, 2012) and provide recognised anchors (Hendriks & Sousa, 2013) for the embryonic theory.

The first data set is then used as an interface for subsequent data sets to ensure relevance, clarifying the occurrence of incidents. This process provides a sense of direction (Holton, 2010), and then completeness as the cycle is repeated when further data is collected, coded and undergoes constant comparison, which is concurrent, not linear (Tan, 2010). Constant comparison requires a search for both similarities and differences to account for and explain the behaviours (Goulding & Saren, 2010). Pattern identification and establishing the dimensions of properties occurs during this stage. The use of gerunds is effective when used to code for actions as they "envision implicit actions and identify how they are linked" (Charmaz, 2013, p. 309).

Sampling is not predetermined with grounded theory, it should be sufficiently diverse to establish satisfactory variation (Binsardi & McLean, 2008), and ensure data adequacy at the early stages of the study. Location, characteristics of the participants and sample numbers is an emergent and evolving process.

Initial findings direct the researcher to a range of people, places and contexts in order to saturate the data (Goulding & Saren, 2010) and requires staying open to what can emerge (Glaser, 2013). Flexibility during data gathering generates an in-depth study of unique events (Seldén, 2005).

In order to check whether new dimensions are inclusive (O'Reilly, Paper & Marx, 2012) theoretical coding is applied to the data which groups similar examples and is a vital component in the identification of theoretical sub-categories. As this process progresses conceptual illustrative incidents are shaped through the act of writing memos to capture ideas.

Memos are discussed by Stern (2007) as; the mortar of theory that is being generated. They provide "written records of analysis" (Corbin & Strauss, 2008, p. 117) and should be written to support the development of the theory. A memo provides a comparison between early data and subsequent data to build links between concepts (Wasserman, Clair & Wilson, 2009). They are a required aspect of grounded theory to capture and illustrate the emerging views and perceptions of the analyst. The documents provide a site for creativity (Green, 2012) and are conceptualised as "instantising" (Green & Bensardi, 2014). Memos provide a location from which the embryonic theory is generated, in a systematic manner during memo sorting.

As grounded theory is conceptual, analysis is raised from a descriptive level. In addition, there is an abstraction of time, place and people. Concepts are labelled through an emergent social pattern which is grounded in the research data (Glaser, 2002), and supported by a range of interchangeable indices, which reveal patterns that were originally concealed.

Coding is the activity that leads, ultimately, to an explanation of ways in which a core category resolves the main concern. Glaser (2012) estimates this does not take more than four to six sub-concepts. In order to actively support theoretical development, based on emerging concepts, the adoption of theoretical sampling techniques requires decisions on analytic grounds about where to sample from next (Urquhart, 2013). This activity provides assistance in the provision of completeness, or saturation and fills any spaces that are evident as the theory develops.

When undertaking a classic grounded theory study, the emergence of a core category is an indisputable requirement (Holton, 2010). Data patterns encroach, become recognisable and provide the essence of the study. From the outset there is no preconceived outline, rather the process is one of coming out during the conceptual sorting of memos that form a relationship structure within the theory based on previously identified codes.

The choice of a core category indicates the stopping point in the data collection (Glaser, 2011b) and should additional data be collected no new categories would emerge; this is the point of saturation. A dimension has been identified that is central and accounts for most of the variation in resolving the problem (Glaser, 1998); there is a clear dominating factor of the study. When using classic grounded theory, the method used in this study; "what counts is only what the data related" (Christiansen, 2007, p. 41).

### **Trenchant Remediating**

Whilst it is easy to be critical, the three ubiquitous tools of SWOT, PESTLE and force field analysis are still found wanting in effecting change management solutions. SWOT is referred to as a pervasive, proven, developmental results oriented strategic planning tool (Helms & Nixon, 2010). PESTLE is a taxonomy that classifies each chance by its point of origin that subsequently requires validation from a variety of sources and multiple occurrences (Schultz, 2006). Force field analysis (Lewin, 1951) is a time-honoured plan for problem solving and actions through the depiction of helpers and hindrances to the desired change, which captures key implementation issues (Schwering, 2003). As a foundation of change these tools are usually depicted as a series of bullet points; they are flat and "tend to exist as descriptive packages of elements that should be considered when undertaking a change program whilst not being particularly useful in the act of implementing it" (MacBryde, Paton, Grant & Bayliss, 2012, p. 464). A case is made by Leclercq-Vandelannoitte, (2013) goes beyond a view of organisation change as a linear, planned process requiring the application of diverse elements. To solve this shortfall the concept of directional disturbance creating increasing organisational havoc is proposed in the grounded theory of trenchant remediating and "challenges the traditional deficit perspective in change management" (Grandy & Holton, 2010, p.180).

### **Status Quo**

Effective change, states the data: *is about being receptive* and requires a more complex approach when the nuance of trends have been relatively stable prior to illustrating new patterns and outcomes. A constant reference point is *behaving in a different manner* and ensuring necessary change actions are timely for the organization by raising awareness to generate a state of change readiness. The individual change practitioner recognises the following concepts: insightful analysing, pervasive inspiring, mindful resolution, risk exposure, deliberate intention, accomplished solving, in addition they "respond to people who give good feedback". These concepts will not be readily located in change management textbooks but provide a transfer from status quo to one of heightened awareness.

In coding the empirical data collected in this study, it is evident that the participants are very aware of the sector environment trends, within which they operate, there is an immediate alertness to movement in business activity. This is apparent from initial codes which include receptivity and recognising, a data extract is: "that message came through like a siren". These actions are not passive and require changed behaviour such as setting up discussions to demonstrate specific alterations to organisational performance. Conversely, they are active and frequent in the way that personal antennae work to gain an appreciation of what influencers are shaping the operating environment and attempting to establish the best way to respond, this entails *discussing ideas*. The amount of activity at this stage is frequently underestimated as *shading in the gaps* occurs. This behaviour required the presentation of data outside the routine system timetable, planned requirements to project performance trends as early efforts to draw attention to where status quo behaviour would lead, and requires a wider pool of people to become aware of the need for change. This is more apparent when linking with other codes emerging from the data, as receptivity and recognising contribute to insightful analysing, illustrated by: "go and ask what other views there

are”, which is done to create a sufficient level of wider focus on the performance variance and is carried out in a manner which uses effective analysis in order to identify potential risks and reduce organisational composure. This process terminates with the conclusion that there is an absence of conceptual levelling, and initiates syndrome alerting at which stage the concept of gradienting commences.

### **Syndrome Alerting**

Concern-resolving behaviours progress from asking to encompass further contacting of key individuals to ensure the level of alertness becomes a priority. At this stage the behaviours were of a reinforcing nature and involved arranging protracted discussions; listening to alternative views about future performance scenarios and determinedly keeping the issue on all internal agenda through repeated communication. Additional support, with data, to debate the potential change indications and ensure the momentum from initial alerting is not lost is crucial. It is at this stage where the level of effort becomes more obvious through *having quiet determination and realising the sector is changing*. The behaviours at this stage are identified as being repetitive and using different approaches from amending fonts and colours in correspondence, that did not comply with corporate practice, showing data to backroom staff and repeatedly asking for appointments to discuss future actions - the outcome of this initial activity is the identification of a difference or syndrome that requires a label to assist in the process of recognition.

Without a label the effectiveness of change communication is likely to be diluted. Examples from the data include terms to protect confidentiality such as *Project Rainbow*, the *Red Bus* or more easily identified terms such as Budget Revision, Takeover Target and so on. The use of coded names is a behavioural tactic to elevate the change issue; it is used as a profile-raising strategy to encourage wider questioning as some asked what was being referred to and introducing checking behaviours in others.

At this stage it is evident that a change syndrome is present. The alerting feedback has sufficient strength and potential momentum to require further action. The symptoms that have resonance from an individual perspective and are easily multiplied up to an organisational level, when conceptualized, could include the similes:

- the always late syndrome
- the “no milk in the fridge” syndrome
- the keeping weight off syndrome
- the can’t find anything syndrome

It is noted by Maister (2008) that the fat smoker syndrome encompasses the knowledge that the strategy for healthy living is to stop smoking, eat less and exercise regularly. Obvious solutions are not, *per se*, easier to achieve than far-fetched ones. This is an initial insight into the use of a paradoxical approach to change.

The points listed above are all examples of systems failure, one of the most common sources of change initiatives; however they are subsequently packaged and communicated within the change management process to provide emphasis.

## Harbingering

From this stage change is ready to be the subject of organisational harbingering. This activity commences with acts of signalling to others through communication of focused messages, undertaking forecasting, and anticipating what lies ahead for the organisation. Behaviours move beyond routine and gaining attention to ensuring priority is given to the imminent change and *the areas of predicting* are widened out. There is a requirement for focused debate in order to create a clear strategy including all functions within the organisation and a senior level adding rank, weight and credence to the performance message. Generating a timescale is central to the change effort and requires additional activity that is visible throughout the organisation. The data states it is like repeatedly attracting the attention of others to prevent slippage and the requirements of the day job taking over. The message needs to interrupt and be sufficiently stark to generate a sense of foreboding. In order to prioritise the imminent change there is a requirement to evaluate the extent and significance of which is manifest in *the areas of predicting that should be debated* to ensure there is sufficient ranking and immediacy related to the harbingering process.

There may be anxieties and apprehension, as this work becomes the forerunner of actual change and awareness of an increasingly steep gradient ahead. It is a priority to implement, and progress, planning and determining during harbingering, a data fragment is: "long, hard thinking, change doesn't usually happen quickly". Any premonition from the early change stage is delved into, broken down or fragmented and evaluated as alterations in outcomes become clearer and more definitive. A course of action is then presented through the code of advocating in order to garner support for the impending change. Highlighting the potential benefits arising from the change, with a belief in the improved post-change environment are all identified elements to support the change initiative and ensure the required change has clarity and conviction. This state is achieved through demonstrating the future performance variance between inactivity and responding to the harbinger. Behaviours are isolationist and require confidence and persuasion.

## Malaising

Managing change beyond harbingering is progressed in the property of malaise, the identified deficiency or syndrome is being considered and discussed in communications within the organisation which leads to feelings of discomfort, unease, disquiet and possible vulnerability: "it feels like an onslaught" all of which combine into the necessary level of agitations to initiate change. Additional effort or volition occurs in this stage to maintain routine operations and ensure the change issues receives sufficient attention when others may be suffering a sense of malaise which has the effect of reducing energy levels within the organization. The behaviours included checks and questions as a method of reinforcing and early quests to identify a remedy.

As the malaise takes hold within an organisation, the data indicates a shift in the type of language being used in connection with the identified change as a solution which is depicted by the code perturbing. At this stage the gradient of change effort is acute; the previous persistent behaviours ensure the change is pressing in nature. A data extract is: "there is palpable unease and anxiety". The responses include a sense of

alarm, feelings of intrusion and threats, which are viewed as being disruptive. It is clear that the change, whilst acknowledged as a necessity, is an additional burden. In some instances the responses are severe, with distressing and ominous connotations. In terms of concern resolving behaviours, the change initiator makes no attempt to dilute or neutralize the pressing gravity and troublesome nature of the change, conversely it is *repetition to maintain the unsettled environment*, which has ensured the change need is felt and acknowledged on an individual basis. At this juncture some behaviours shift more obvious to remedy, seeking where comparisons are researched and specialist opinions requested to develop a course of action to address the malaise.

### **Transpadaning**

Finally, change of such difficulty that defies visualisation is coded as transpadaning; that which is situated beyond normal reach and is difficult to visualise. It is off the scale and has a gradient that is so steep it is precipitous, referred to as "not idle musings, they are well off the performance enhancing scale". This type of change requires significant risk in order to implement. It may be preceded by a pause, in order to undertake learning activities linked to the extent of risk before proposing and agreeing a radical course of change action.

Organisational change is not a neat two by two model, or a circle divided into quarters; it is uphill, and uncertain, requiring prolonged and persistent effort, that is supported by drive and energy in order to implement in a successful manner. "It's about doing, not stopping; you know I was obsessed with the change." The behaviours exhibited are identified as emphatic, and preventative, to stop any slippage back to the status quo levels. In addition, there are occurrences of bringing discussions back to the core change issue to limit distractions and procrastination by using a directive style. This aspect of change is the trenchant element of the grounded theory that takes an organisation "through willpower and keeping going, with the body and the mind", is the data message, into new and different terrain, circumstances and procedures.

A steep gradient needs to be climbed, "it is an internal feeling", towards a horizon in the far distance that may appear to keep moving further away. It is insightful analysing, related to the specific change issue, that assesses the effort that will be required. At the outset of the project the level of effort may not be apparent, hence discovering through precipitous transpadaning is where the changed positioning for the organization lies. The levels of change effort are depicted in figure 1. In order to complete the change, trenchancy is the theoretical complementary concept.

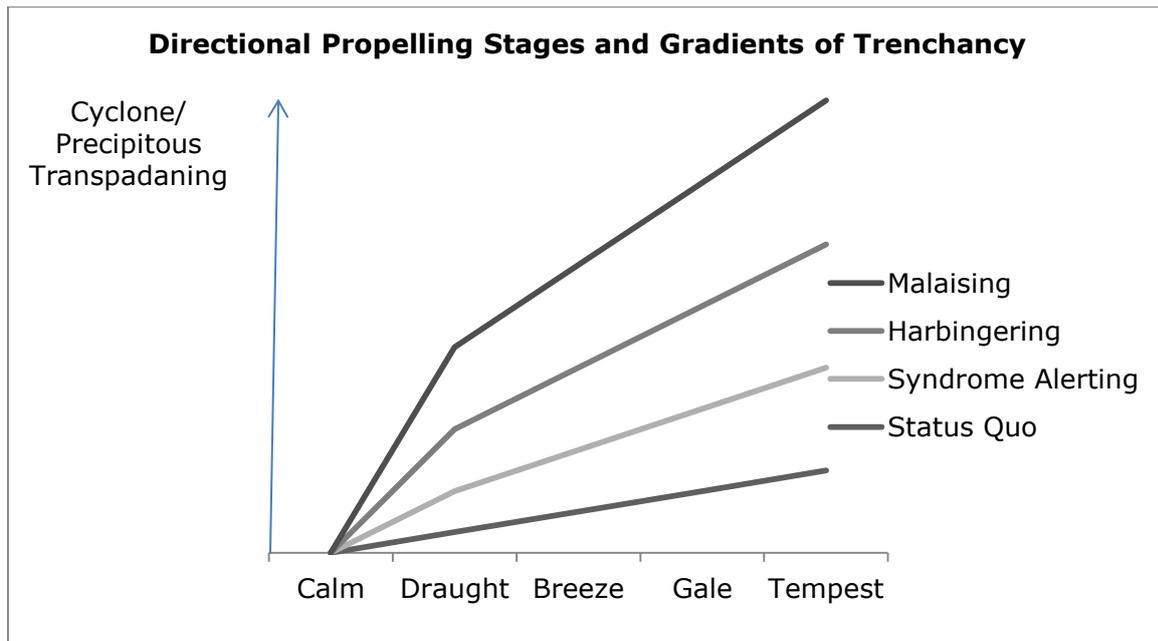


Figure 1: Directional propelling stages and gradients of trenchancy.

### Trenchant

Trenchant is not a widely used word. For the purposes of this grounded theory trenchant encompasses “vigorous or incisive in expression or style” (Trenchant, n.d.), traits required to support the prolonged effort that provide the foundation to successfully implement organisational change.

The data refers to change projects as *a consuming effort* on behalf of those involved, that requires prolonged resolution and striving in order to maintain the change impetus and is supported by the determination to succeed. Throughout this process a source of personal energy is an essential element to *sustain the momentum* and the activity. Respondents state recognition of their personal energy patterns throughout the day; peaks are used for the most difficult tasks.

Initial enthusiasm for the change was saturated within the data in order to generate what is conceptualised as a *directional propeller*. This conceptual behaviour creates the necessary turbulence that moves the organisation, and those within it, from a state of malaise to one of being perturbed; this requires “positive vibrancy and a mixing together of circumstances to create instability”. To achieve this feat, the data states the *considerable discipline* that must be drawn on to shoulder the burden of a change undertaking that may persist for considerable periods of time. The data refers to periods varying from three months to five years, and also to repetition “it took pushing and an incredible work ethic” both within and outside those periods.

Working with effort requires willpower, the data stresses that the contribution of willpower and effort determines the level, and extent, of change completion leading to a period of isolation that is used to recover and repeat the effort. References to prolonged endeavours, acting in a wilful manner and refusing to stop also appear in the data with sufficient frequency to achieve saturation. This is through reinforcing the

comments related to being disruptive and the need for repetition and emphasis in delivering the change message. One respondent refers to a "personal level" in relation to succeeding and ensuring achievement, followed rapidly by change maintenance to stem slippage tendencies.

Where additional effort is required, the approach is: "what comes after overdrive? More drive". A trenchant state arises where a course of action is resolute and unwavering. At this stage persistence may become obsessive, the energy is relentless, and focus is essential, resulting in an incurable need to *produce results*.

It is important to emphasise this aspect of organisational change, and the consuming doggedness, required to support the effort that emanates from being trenchant. Whilst these catalysts reside in the individual, the management of change requires infusion generated from an energetic approach; to provide a source of momentum and drive that transfers and spreads to all areas involved in the change initiative. This is *hard work* – one respondent suggests this should appear in capital letters! Hard work, supported by personal drive, is the outcome of individual effort that is multiplied through repeated and, where required, prolonged infusion of the change message throughout the organization.

The vigorous aspect of trenchancy requires energy to support the effort expended. Energy enhances the ability to retain focus and concentration and supports the completion of tasks. This property is highly valued by the respondents, and they make effective use of recovery periods to carry out below base line tasks - in addition to paying attention to their own hydration, nutrition and rest/sleep patterns during the remedy seeking section of effective change management.

Representing the presence of trenchancy in a conceptual diagrammatic form uses the previously referred to notion of the directional propeller. This causes a form of disturbance depending on size and speed of rotation. The disturbance is the extent of the change and the rate of propulsion required. This correlates with the gradient of change, identified earlier in the steepness of slopes that are evident during the change process. A steeper gradient requires a stronger directional disturbance to maintain the momentum and level of disturbance that drives and supports the identified extent of change.

## Discussion

Organisational change, the management of change and implementation of change are not new issues, they have been extensively researched and written about. Regardless of all this research, the academic community still seeks inspiration due to the high proportion of reported change management failures.

This paper presents a broad range of concern resolving behaviour in the empirical data and therefore achieves objective one. Objective two is met through the presentation of the conceptual grounded theory model of change – trenchant remedying which is readily modifiable (Glaser, 2003) to a wide range of change situations. This section provides endorsement; objective three. The core category is evident in the data as saturation was reached in the notion of remedying through two main concern-resolving behaviours that commence with awareness of a difference; that in many

instances is very slight. It is similar to noticing the nuances of the seasons, the first green buds in spring, the first golden leaf in the autumn as the rhythmic, routine and settled manner (Kippenberger, 1998) of organisational life becomes disordered.

In the model, this stage is a conceptual draught that may be no more than a rustling of papers by an open window; however it is a prelude to the winds of change. When such subtle cues are missed the change commences in a catch up stage. Alternatively, where the organisational radar captures such nuances, there is an advantage, which the literature refers to as change readiness, "a collection of thoughts and intentions towards a specific change effort" (Bernerth, 2004, p. 39) in addition to a measure of receptivity to change (Frahm & Brown, 2007). An approach to assist at this stage is through the use of opinion leaders (Hammond, Gresch & Vitale, 2011) to describe and share the problem.

Progressing from change awareness the model proposes thorough communication, which takes various forms on several occasions to those who are, or will subsequently become, involved in the change. This is a further area of change that is frequently ineffective (Nelissen & van Selm, 2008). In the absence of clear and extensive communication, supported by illustration to provide focus and repeated reinforcement sufficient change impetus may not be generated. The existing literature fails to sufficiently emphasise the type of language that supports harbingering, and there is a potential mismatch between the identified change and how it is portrayed. This is a clear induction from the theory that requires trenchant behaviour to remedy as the move from status quo commences and gathers momentum, and the breeze generated through initial efforts develops sufficient disturbance to become a persistent draught requiring attention.

The change model of trenchant remedying uses the conceptual process of harbingering to announce, and act in the capacity of forerunner. The knowledge broker framework which involves participation and sharing in the decision making process (Pardo-del Val, Fuentes & Roig-Dobón, 2012) is applicable as a reinforcement mechanism. The use and application of a change readiness model to emphasise the identified discrepancy which needs to be addressed (Armenakis & Harrois, 2003), with organisational support and involvement from leaders adds authority and momentum to the change.

Post harbingering, when carried out in an emphatic manner, should result in organizational unease. This unease is a core symptom of malaise, to generate action in order to establish the precise identification of what is amiss and therefore requires correction or change.

Proposals to implement change create a different momentum, as the change force develops into a noticeably strengthening breeze that compliments the concept of malaise and has the potential to become disruptive and prevent a return to earlier and more settled circumstances. Undertaking pilot schemes to develop learning practices as change enablers (Van Oosten, 2006), to narrow the variances between ideal and reality are proposed as supportive techniques to improve and revitalise established practices.

Following an emphatic message, to generate momentum, that requires a personal energizer to attract commitment, have their ideas considered and get more from those around them (Cross, Baker & Parker 2003) to maintain the malaise should be

increasingly evident as the organisational disturbance expands. This is an example of how imagery (Gatin, 2013) is applied to grounded theory. The change gathers speed and force (Bruch & Ghosal, 2003) disturbing the atmosphere beyond a pleasant breeze to an agitating gale and may unearth difficulties (Dreher, 2002). The model identifies this stage as perturbing and it is a situation where remaining unaltered is difficult to achieve. This is the crucial stage requiring personal drive and trenchant behaviours to push and progress the change through to completion when "the wind of change, blows straight into the face of time, like a stormwind" (Scorpions VEVO, 2009). To counter the strengthening wind requires drawing on mental equipment (Lawrence & Hohria, 2001), to sustain energy, which is ambiguous as a concept, it is an enigma (Todaro-Franceschi, 2008). It is a force like the wind, powerful and individual (Bruch & Ghosal, 2003).

Green (2012) suggests trenchant mannerisms such as personal resolve and directional choices provide the final elements in remedy seeking so that "a person's knowledge and emotions fuse into the resolute intention that defines willpower" (Bruch & Ghosal, 2004, p. 53).

Throughout the precipitous climb of transpandering the internal presence of drive, or a demand on the mind for work (Freud, 1973), that provides a determination to succeed (Meldrum & Atkinson, 1998) are effective and supportive mechanisms in the final stages of successful change. Butcher and Atkinson (2001) emphasise the inclusion of enthusiasm and vigour in change communications to propel and maintain the change by adopting a proactive, driver-like approach.

In a competitive environment, the notion of winning is frequently overlooked, however, according to Dehler & Welsh (1994), winners are best able to harness energy sources, due to sufficient potent energy to shift mind-sets (McLagan, 2001). This is a frequently occurring obstacle to successful change, the "it might not happen" to "what shall we do, now that it has happened?" This situation may be so extreme that a combative stance (Felício, Rodrigues & Caldeirinha, 2012) requiring self-control, strength and single-mindedness (Muraven & Baumeister, 2000) support the extremity of the transpandering process.

Failure to pay sufficient and timely attention to the early stages of change have the potential to result in the need to undertake a change of extremes, this is transpandering. Transpandering is a state that may be situated beyond the parameters of the organization and those working within; it is of the utmost severity as it is undertaken whilst enduring the barrage of a tempest. Tosey & Llewellyn (2002) make reference to mobilising activities to unblock the natural flow of energy to underpin change processes, particularly valuable in extremist circumstances. In the event of the change requiring prolonged trenchant mannerisms (Green, 2012) the possession of resolute intention (Bruch & Ghosal, 2003) are the pre-requisites, that harness energy (Dehler & Walsh, 1994) and utilise the application of quantum feeling through association with energetic self-talk (Shelton & Darling, 2001).

The state of transpandering is only achieved by not having the limiting mind-set referred to by Smith (2003), through the dispensing of thinking boundaries to become liberated and supportive of change take-off.

Beyond this point in the model there is recognition of a precipitous situation where risk and the potential to fail have a higher prevalence within change management.

This requires a powerful potency (McLagan, 2001), in order to generate a mind-set shift that is sufficiently robust with infinite horizons to operate within the metaphoric cyclone that has developed; such is the organisational impediment requiring attention to change.

Where, then is the inspiration in relation to change? It must be initially in the tone and style of the change message delivery, this should be with panache, in the style of an envoy, as the legal department would say: "for avoidance of all doubt". The grandiose nature of quantum thinking (Shelton & Darling, 2001), as a change management framework, draws on elements identified in trenchant remedying. Examples include imagery, energy and recognition supported by mindfulness and mastery; this is the cornerstone, or whirling interruption of tranquillity for change that has sufficient momentum to prevent premature settlement. The change harbinger should, in addition to messaging, encourage creativity to be unleashed within an intrapreneurial setting, where creativity is actively encouraged to support and spread the change loading.

To conclude, in the age of rampant technology a change management app is overdue for those immersed in the essential organisational process to keep pace with rapid fluctuations in operating environmental demands, the *raison d'être* of change. Where is it?

### **Directions for Further Research**

Discovery, as one element of the appreciative inquiry is referred to in the theory - and whilst the entire concept does not appear in change management texts with any frequency - the use of this technique is suggested as an approach to be considered further in conjunction with trenchant management styles to establish the effectiveness of a dual approach. An update on quantum thinking and the valuable contribution of volition is also timely. Additional research into the use, and success, of these techniques is suggested to view change from alternative perspectives and further contribute to insight and understanding of this increasingly important phenomena and provide additional assistance for future practitioners.

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## **Applying Grounded Theory**

Barney G. Glaser, PhD, Hon. PhD

Application of grounded theory (GT) is a relatively neglected topic by my colleagues. I have written several chapters in my books on applying GT. Two colleagues, Odis Simmons and Barbara Artinian (2009), as well as Dirks and Mills (2011), and Walsh (2014), have also written about applying GT. In the first two chapters of this book I discuss at length properties of generally applying GT and then professional issues and personal matters when applying of GT. There follows in this book nine chapters, four by me and one by Simmons and one by Artinian and one by Dirks and Mills, that are already published in books on GT, and one by Walsh. Thus, this book ends like a reader which publishes in one place already written work. The reader of this book may experience some redundancy in these chapters, but that is the nature of reader texts as different authors discuss the same ideas and topics.

### **General Properties of Applying GT**

In this book I am writing about only the application of classic GT as I originated it in 1967 in which the concepts of a GT theory are abstract of time, place, and people. Thus, I am NOT referring to any of the multi versions of so-called GT. The multi versions are just different and, to some degree, just jargonized with GT vocabulary. The application of GT has been almost totally neglected in the literature on GT. Yet, it is a vital topic for our profession and ourselves. Thus, I will be writing about the application of abstract concepts whether embedded in a theory or just singular. I will be writing about applications to profession, literature, in service to clients, and for personal use.

Anselm and I saw clearly when writing "Awareness of Dying" in 1965 the general implications of our awareness context theory for application as it gave many control and access concepts. As a consequence, I wrote the chapter on the practical uses of awareness theory (see chapter 3 herewith). In this chapter I detailed at length, in a very formal manner, the requirements for applying awareness theory. I asserted that to be applied a GT must fit the area to be applied, must be relevant to the people applied to, must be understandable to the people in the area applied, must be sufficiently general, and must give the applier some control. This formatting was especially to compete with clinical practice conjecture. Today, 50 years later, these requirements are true enough for applying a whole GT, but they are only a small part of applying GT during these preceding 50 years. Most application in recent years is applying an abstract GT concept, which has grab and general implications, and thereby helps explain what behavior is going on. This can improve clinical practice or other behavioral patterns with intervention when one is allowed to enter and improve the environment. Applying a whole theory in a formal way is possible but is not necessary.

In recent years among the few who apply GT, we just purposely intervene for improvement in behavior with conceptual explanatory power from one imageric concept-- usually, which is usually a core category, not a whole theory. Today we also apply GT, non-purposely, almost automatically as an informal conceptual explanation as it may occur in casual conversation or a happening. It is the way people knowing grounded theory think. Grounded theory concepts have abstract power and grab for people. Informally applying GT has grown with the spread of classic GT

Of course, a GT is applicable to data from which it is generated. It also applies with fit and relevance to similar areas of concern. Thus, awareness applies to many areas of medical concern. What I wish to add is that application of a GT is based on conceptual fit and relevance, even if the area is different. For example super-normalizing theory applies on the football field as well as among heart attack victims or skiers. Or credentializing fits many areas where competence and quality control are necessary. Or routing based on BMR's (basic mobility resources) goes on everyday in our lives. As we plan getting from here to there.

These fits to many types, and areas, and data occur almost automatically and conceptually irrespective of the data from which they were generated. Their conceptual grab and their use is nonstopable and occurs informally and casually more often than formally. Thus, we do GT applications naturally in many ways. The GT methodology is based on coding what we do naturally, that is comparing incidents in our lives to see patterns in everyday life. GT comes naturally in our everyday private life. We know our routing patterns, we know the credentializing patterns of school and work to assure quality behavior. We know purchasing patterns of food markets and so on. We are constantly coding brief GT's naturally that we generalize and engage in behavior in terms of. We all are applying GT of some sort. (See below on Personal applications).

When applying a GT to fit and be relevant to another area of concern, we use the constant comparative analysis to apply and even generate more conceptual properties to perhaps apply. Thus, the original theory, when applied, generates even more theory through application. 'This can start a formal theory implication depending how far one takes application by constant comparison. This analysis for application can back test the GT for preconceptions, though they seldom occur in a well generated GT. The preconception concepts will not work.

Planning ahead of time to generate a GT, as many do unfortunately, that can be applied (hopefully) is not classic GT. It preconceives the emergent problem in the problem area and thusly the concepts needed for fit and relevant application, both of which cannot be preconceived doing GT. They must be discovered and the applicability will emerge with it. Dirks and Mills are wrong in saying that the goal of applying GT must be part of the research to achieve "ultimate worth" (see chapter 6). This is pure preconception, which GT avoids to get data on what is really going on.

Be careful when applying a GT exactly to a different population, as the main concern may be different for the new participants. Also the reciprocal effect of the application to another main concern may require a major modification of the applied GT. It is better to

just apply the conceptual understanding of the existing concepts with conceptual properties from constant comparisons that fit with relevance to the emergent concerns of the new population. (See chapter 3 on intervention with GT).

When considering the application of an existing GT, generated by oneself or another person, one needs to ensure that it is credibly relevant and fits to the applied to population. The modification may be general or specific depending on the intervention purpose. The intervention may be for general understanding or social structural change or a combination of both. Thus the managerializing of client oriented service practice is to sharpen service with understanding. Only use that part of the GT that applied and, if necessary, just reciprocally modify that part of the GT. Intervention properties will emerge as to how the GT is best applied. Stay open to reciprocal modifications that are earned by generating. This is not correcting a GT. It is extending it with more fit and relevance.

GT helps us to see things as they are, not as we preconceive them to be. Even without a GT, having a GT orientation helps us spot preconception when applied. We do not know how to apply GT until preconceptions are spotted in the participants' behavior and attitude. GT orients us to seeing our behavior and the behavior of others as data; we are able to see these things as they are, not as we wish them to be. Without preconceptions our minds are free to see things as they are so we can apply with trust in a favorable outcome. As the applying proceeds, the GT itself grows with the outcomes from application.

Since they are abstract, GT concepts are generalizable; they apply based on the reversibility of interchangeable indicators to a wide range of empirical data or indicators within situations and contexts with fit and relevance. The abstract power of a GT grows in applicability when it is applied while it remains empirically grounded with fit and relevance. GT grows with its use in application. Grounded changes occur in the problem area with no conjecture or speculation. Complex multivariate GT applications are grounded and practical; they become useful over a wide range of areas. Generalizing with GT concept can go on forever.

GT applications of generalizations are not stale dated as are QDA generalizations or descriptions where the description changes any time. GT applications are abstract and modifiable upon comparisons. With GT providing the links between concepts and recommendations for change in data, interventions and resulting changes for practice are not difficult since recommendations are grounded with modifiable abstractions. Conjectured theory is easily forgotten as reified and too abstract; the GT concepts fit with relevance and necessary modification as they are grounded. Grounded abstraction generates implications and possible interventions for application. And the application itself can easily generate more properties (concepts) than the applying GT concepts.

Context during application is a general word for environment or situation. As the application precedes it gives control and access to the situation. It helps the applier understand and explain to clients what is going on in the context to which it is being applied. The application can also help effect a change with sensitivity in or to the context problem. As said above, application of GT concepts can also modify the GT conceptually

with new ranges, imagery, and properties of the original GT concepts by comparing the GT concepts with the applied to data or concepts which generate the modifications.

When necessary, application of a core concept or its subcore concepts is especially applicable because people can see them as applicable in many places for their conceptual grab and power. Like the core concept supernormalizing can easily become conditioned and contextualized for use because of its imagery and grab. Same with managerializing practice or credentializing certifying quality performance, or resisting residual selves, or atmospherizing a groups meeting, or competence displays and so on. This aspect of the abstract power of GT concepts is very powerful. The concepts fit with relevance general to other data, far beyond the original data that yielded the emergence of the GT. The original data can easily be forgotten. One does not need to know it for application. A GT can become autonomous as it is seen and applied "everywhere."

Needless to say, descriptive generalities of QDA lack this power. They become stale date very quickly. They are not abstract of time, place, and people as GT concepts are. Thus, when applied, they can be incorrect a day or two or weeks later, so their applicability is very limited. (see my book of Descriptive Remodeling of GT). They are stuck with the worrisome accuracy concerns of QDA as data changes. GT concepts do not change. They get modified by properties yielded by constant comparisons. Thus for example, supernormalizing of heart attack victims theory can easily be applied to studying management with regard to the over demand of on its staff beyond their normal physical limits. In short, the application of GT is a field just waiting to happen beyond its meager beginnings to date. It is lacking in the literature because of its lack of research and action on applying GT.

When considering a GT application of an existing GT (generated by oneself or another person), the applier needs to ensure its credible relevance to application population. This relevance can easily require modifications to the applied theory to ensure fit and relevance. The modifications may be general or specific depending on the specific purpose of the impending intervention, which could vary from a specific change to just a general understanding or a combination of both. The abstractness and generality of GT conceptions allow the generation of GT changes and formulations at the same time when constant comparing concepts to intervene. The applier need only use that part of the applied GT theory that fits with relevance. For example, an applier could use the just applying awareness theory to pretense awareness contexts. When applying the concepts, the applier lets emerge how application best works and how reciprocal modification of the theory emerges also to suit the application. The applier stays open to earned reciprocal modifications. These modifications are not correcting the theory. They extend it with growth in its power with more fit and relevance for a wider variety of data applications.

Be careful in applying a GT to a different population with a different main concern. Even with reciprocal modifications the GT theory may not fit with sufficient relevance and forcing concepts on behavior may occur. Short of doing a full-on GT on the new population, it is best to just apply some concepts to give some understanding of the participants current behavior and not suggest change and solutions. Interventions of a stronger nature could go

awry. Simple understandings can grow and emerge to intervention for the participants on their terms.

Applying a GT that gets reciprocally modified and extended by the data applied to it does not produce a formal theory beginning. It just modifies the existing theory with more conceptual coverage. It just extends the substantive GT. A formal theory generation requires a full systematic comparison of two or more well-generated substantive theories based on enough participants to show established patterns. For example, a formal theory of supernormalization would require systematic comparing of separate substantive GTs on heart attack victims, on professional football players, on recreational skiers, and on impaired aged people. A single substantive GT can sound like a formal theory and can be written like one, but it is not one. By the same token, substantive theory seems to be enough and quite applicable to a variety of populations. There are almost no written formal theories (See Status Passage, by Glaser and Strauss, 1971). Applying a substantive theory to another population sounds like generating a formal theory but it is not. The substantive GT is just expanded and may be written "as if" formal. Application mere starts the idea for doing a formal theory (if one has the resources).

Applying GT with a goal of a specific change may bring in preconceptions as to desired change. However popular and realistic the change may be to many, it can bring in preconceptions that are quite biased. Using GT for this purpose is counterproductive and undermines the quest of GT -- what is really going on. The applying of GT resulting in a favorable change should emerge naturally. The general implication of a GT concept can easily lead to conjecture on its possible use for a bias change. As powerful as it may sound, the change should emerge from applying the concept, not as an application requirement goal for a concept.

This concludes my chapter on general properties of applying GT. It is thin because so little has been written on applying GT, which yields then properties of applying for others to analyze. This chapter then is merely a beginning of a bigger study waiting to happen. I now turn to discussing properties of professional and then personal applying of GT.

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## **Using Grounded Theory to Avoid Research Misconduct in Management Science**

Isabelle Walsh, Neoma Business School

### **Abstract**

In this article, I show that several of the most common forms of research misconduct in quantitative research in management science could be avoided if researchers made open, comprehensive use of the well-established Grounded Theory paradigm when using quantitative data. Investigating various mainstream management research outlets, I found that this is scarcely ever the case. I propose some viable alternatives for the design of quantitative and mixed studies in management science. If these alternatives are used, researchers could follow the main basic assumptions that lie at the roots of Grounded Theory, and make sure these assumptions are clearly stated in order to avoid being pushed toward episodes of misconduct that have become common in the field of management science.

**Keywords:** research misconduct; quantitative and mixed studies; GT paradigm

### **Introduction**

In 2010, Bedeian, Taylor, and Miller investigated questionable research conduct through a survey of 448 faculty respondents. They grouped possible forms of research misconduct into three broad categories, the first being considered the most serious. These were: fabrication, falsification, and plagiarism; questionable research practices; and other misconduct. Within the first category, I am specifically concerned in the present article with those studies that withhold methodological details/results, and those that select only those data that support a hypothesis while withholding the rest. Bedeian et al. (2010) described this practice as "cooking data" (p. 718). Within the second category, of research misconduct, I focus on those studies that develop hypotheses after results are known; this practice is known as "HARKing" (Hypothesizing After the Results are Known: Kerr, 1998; Garst, Kerr, Harris, & Sheppard, 2002).

This article argues that one way to help solve important research misconduct issues in quantitative management research might be to revisit grounded theory (GT: Glaser & Strauss, 1967). This could be as a research paradigm applied in mixed-method studies; thus may avoid making claims and conjectures after quantitative data yield surprising results.

This article is organized as follows: I first summarize some common forms of research misconduct in this field, which leads to an established type of design for quantitative research published in mainstream journals. I then propose some alternative designs for quantitative studies in management science. I investigate the literature for

published studies that included quantitative and qualitative data and methods in a GT approach, and show that mixed-method GT research is scarcely present in top-tier research outlets in management science. I conclude by encouraging management researchers to apply what is already “ancient history” in other fields of research.

### **Cooking Data and HARKing: Two Important Issues in Quantitative Studies in Management Science**

80 percent of Bedeian et al.’s (2010) respondents reported witnessing “cooking data” (p. 718) and 90 percent “HARKing” (Garst et al., 2002; Kerr, 1998). The article reported that hypothesizing after the results are known was often expected, with junior researchers being instructed to “comb through correlation matrices and circle the significant ones” and to examine “all possible interactions or moderators” (p. 719). This is not reprehensible in itself, if it were openly reported as such. However, it is scarcely the case, as most quantitative research takes a hypothetical deductive stance. Presentations of most so-called quantitative positivist studies published in the mainstream management literature start with a literature review that leads to hypotheses, which are subsequently tested. Unexpected results are explained by “conjectures” (Glaser, 2008). This linear design is quite acceptable if it relates an empirical research study accurately and truthfully, to the way it actually happened. However, Bedeian et al.’s (2010) results show that this is rarely the case, and that hypothesizing often occurs after the data have been collected and results from statistical analyses have been obtained. This can lead to the so-called Texas sharpshooter bias (Gawande, 1999; Thomson, 2009): the fabled “Texas sharpshooter” fires a shotgun at a barn and then paints the target around the most significant cluster of bullet holes in the wall. Accordingly, the Texas sharpshooter fallacy “describes a false conclusion that occurs whenever ex post explanations are presented to interpret a random cluster in some data” (Biemann, 2012, p. 2).

As an illustration of this linear process of traditional quantitative studies published in management, see figure 1.

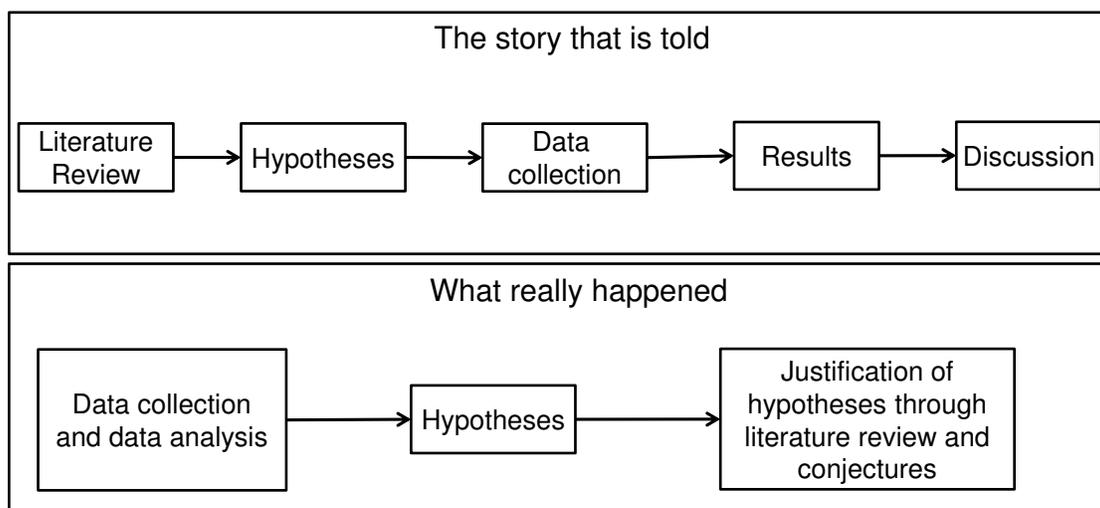


Figure 1. Traditional design of quantitative research “suffering” from Texas sharpshooter bias.

How, then, can quantitative research avoid such research misconduct? What alternative research methodology can we propose to avoid such misconduct? Before we answer these questions, I first address (in the next section) the difference between the terms "mixed method" and "multi-method".

### **Mixed-Method and Multi-Method Research**

It is necessary to distinguish between the terms "mixed-method" and "multi-method" as these terms are both used and understood differently in the literature. This article follows Morse's (2003) differentiation between these two terms.

I understand a multi-method design as the use in one single project of different research methods that are complete in themselves. For example, in a research project, one may choose to conduct interviews and collect qualitative data using a GT approach, and use the resulting emerging theory to develop and lay down hypotheses. Then the researcher may collect quantitative data and verify the hypotheses through statistical methods using a hypothetical deductive stance.

I understand a mixed-method design (the design that interests us in the present work) as including different quantitative and qualitative methods to supplement each other within a single project. For example, one may collect qualitative and quantitative data and analyze these through various qualitative and quantitative methods. Neither qualitative nor quantitative data/methods are sufficient in themselves for theorization or verification; both are necessary. Such a project may be qualitatively or quantitatively driven, depending on the "core" method. The other ("imported") methods serve to enlighten and are a supplement to the "core" method. The theoretical drive may be inductive overall; with description, discovery, and/or exploration as purposes of the research (as is the case for GT studies); qualitative methods will more often be the core methods used in this case. Alternatively, the drive may be deductive if confirmation is the purpose; in this case, quantitative methods are more often the core methods used. Thus, there are different types of mixed-method studies, and one can refer to Morse (2003) – and, more generally, to Tashakkori and Teddlie's (2003) excellent handbook – for an extensive review.

In the case of multi-method studies, "the need is small and the yield not great ... Quantitative research when used for verification ... is just not worth it" (Glaser, 2008, p. 12). Quantitative data should be used as "more data to compare conceptually, generate new properties of the theory, and thereby raise the level of plausibility of the theory. In short a quantitative test is really just more data for modification" (Ibid.). This leads us to mixed-method rather than multi-method studies in order to propose alternative designs for quantitative studies.

### **Alternative Designs for Quantitative Studies in Management Science**

Much more than a method or a methodology, GT may be considered as a research paradigm (Glaser, 2005) that could be extremely useful in a 'young' and 'soft' science such as management. It is a paradigm, in the sense given to this word by Klee (1997): a model to be imitated, adapted, and extended "that defines practice for a community of researchers" (p. 135). It allows researchers to discover what is happening in a substantive domain and to structure reality. This paradigm is not limited by a given epistemology or ontology: it is

“open” to any epistemology and ontology that may be espoused by researchers. It relies on collected data and the exploratory approach applied with the various techniques chosen by the researchers to analyze their data. Even though GT has been used mostly with qualitative data, it is an inductive research paradigm that can be used with any data, in any way, and in any combination. This has been stated by Glaser a number of times (Glaser, 2008). Most importantly, this paradigm should allow quantitative researchers to ‘tell the truth’ and relate their inductive research as it actually happened.

When conducting quantitative research, and if you wish to take an inductive approach grounded in data, I would propose being clear about this and relating your research the way it happened. This would mean not necessarily following established publishing canons, however tempting this might be. You might even aim to help establish new publishing canons.

If the literature is not sufficient to allow you to lay down hypotheses and/or if you feel urged to test unexplored possibilities, you should be clear about this (see Alternative design 1, figure 2) rather than pretend otherwise (see The story that is told, figure 1). When unexpected results occur, you could pursue data collection through a qualitative approach, in the hope of making sense of your data and emerging results (see Alternative design 2, figure 2).

Furthermore, even if hypotheses relying on the literature are verified, this should not stop you from being compelled to explore other possible paths further. By so doing, and if you remain in an exploratory grounded stance, you might uncover essential theoretical elements which were previously unrevealed.

The next section investigates the literature from some mainstream research outlets in management science to search for studies that might do this and use mixed-methods in a GT approach.

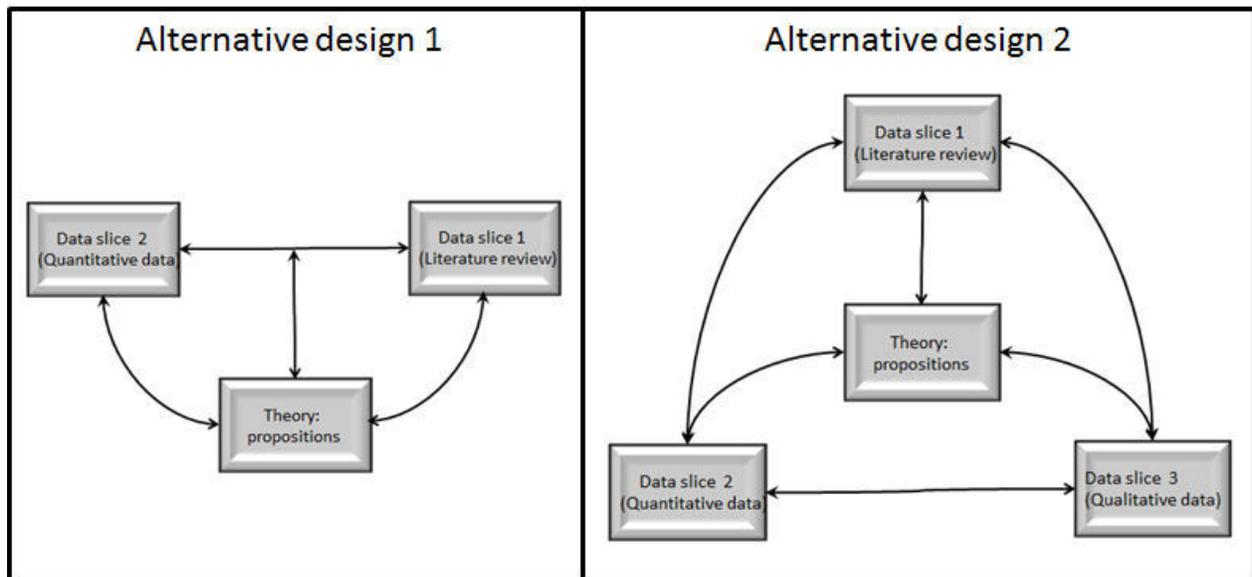


Figure 2. Some possible grounded designs to avoid research misconduct

Note: The double arrows are non-functional and aim to represent the continuous comparative analysis of data in a GT study.

### **Investigation of the Mainstream Management Literature for Mixed-Method GT Studies**

I investigated the literature for empirical mixed and multi-method studies that used qualitative and quantitative data and methods, with a GT approach. My preliminary search was done for both mixed-method and multi-method studies - as there does not appear to be a full consensus on the definition of these terms in the literature. For my preliminary search, I used POP4 (Publish or Perish) software (Harzing, 2007), which uses Google Scholar as the database. I searched for the following terms anywhere in the text/references of articles: "grounded theory" + ("mixed method" or "mixed-method" or "multi-method" or "multi method" or "multi-method") + "quantitative" + "qualitative". I investigated articles published in four top-tier management science outlets: the *Academy of Management Journal*, *Academy of Management Review*, *Administrative Science Quarterly*, and *Organization Studies*.

Of the 14 articles that my preliminary search yielded, only three possibly fitted my purpose (Grant, Dutton, & Rosso, 2008; O'Mahony & Ferraro, 2007; Schall, 1983). I further investigated and analyzed these three articles.

Both Grant et al. (2008) and Schall (1983) barely mention GT *en passant* as a simple reference: Grant et al. mention only their "emerging theoretical understanding" (p. 902) and Schall mentions that "no predetermined categories were used" (p. 567). They certainly do not stress the emergence of theory, the constant comparison between all sets of data, or theoretical sampling. Of the three identified texts, only one (Schall, 1983) uses mixed-methods. The other two (Grant et al., 2008; O'Mahony & Ferraro, 2007) use a multi-method approach; they adopt a GT approach to develop hypotheses that they subsequently test with quantitative data and methods. Thus, they divide their work into two sections: an inductive, exploratory, GT-building section with qualitative data; and then a confirmatory, deductive approach with quantitative data to test the predictions resulting from the first part of the article. For instance, Grant et al. (2008) utilize quantitative survey data to verify the sense-making mechanisms highlighted with their qualitative data.

It is particularly striking that the only one of the three studies that in any way approached what I was searching for dates from as far back as 1983. It tends to confirm that, although the importance of exploratory quantitative analysis is a long-established concern (see, for instance, Benzécri, 1973; or Tukey, 1979), in more recent years, quantitative research in management science have implicitly adopted the hypothetical deductive stance of hard sciences, despite this leading to widespread research misconduct and being ill-adapted for theoretical development. This is most probably induced by management science's quest for legitimacy which drives this soft science to try to imitate the methods of 'hard' sciences even though these methods might be inappropriate (De Vaujany, Walsh, & Mitev, 2011).

### Conclusion

In the present article, I have shown that in management science we have at our disposal instruments and an established paradigm (Glaser, 2005), that could help researchers respect mandatory deontological precepts while conducting their research (in particular that involving quantitative data). These instruments are, however, little used in management research, even though they might yield valuable theoretical results. Inductive, exploratory, grounded quantitative research is not new. It has been established for many years in other fields. In the mid-1960s, at the time when Glaser defended his dissertation (which used quantitative data), people such as Lazarsfeld (who subsequently published inductive quantitative studies himself e.g., Lazarsfeld, Thielens, and Riesman, 1977) or Havemann and West (1952) were encouraging the use of quantitative data in inductive research. It is perhaps timely for researchers in management science to use GT more comprehensively. While doing so, it is essential for false methodological claims to be eliminated, to avoid the second form of mislabeling associated with GT, and highlighted by Birks, Fernandez, Levina, and Nasirin (2013), that of omission (in which GT is used but not reported as such). When conducting quantitative research, I propose that researchers follow the basic assumptions that lie at the roots of GT, and make sure these assumptions are explicitly stated. This will prevent researchers being pushed towards episodes of misconduct that have become common in the field of management science.

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## **Book Review: Memoing – a GT Essential**

Naomi Elliott, Trinity College Dublin

*Memoing: A Vital Grounded Theory Procedure*, Barney G. Glaser (2014) Mill Valley:  
Sociology Press

This book, on memoing, is intended to support grounded theory researchers and scholars who want to deepen their understanding of what the procedure of memoing is about. For doctoral candidates, who are learning the craft of doing GT, it provides an academic reassurance that memoing is free-style and there is no one “correct” way of memoing. For researchers who are supervising or teaching others the craft of doing GT, it is a practical resource and provides a springboard for scholarly discussions about memoing and how it can be used in the development of grounded theory.

Having reviewed the use of grounded theory over the years, Barney G. Glaser identifies the problem that memoing is being neglected as a GT procedure, hence the reason for dedicating this book to memoing. He also identifies a problem of uncertainty - which many GT researchers experience about whether they are memoing “correctly”. As an experienced teacher, Dr Glaser dispels these uncertainties with the notion of free-style memoing and gives permission for researchers to tap into their own creativity and problem-solving ability by developing their own style of memoing. In this he motivates researchers to DO memoing and to avoid getting hung up on following a pre-set or someone else’s style of memoing. The book title *Memoing* in itself is important as it is a gerund, an action verb, which conveys the importance of *doing*. Glaser’s invaluable teaching point that should not be missed here: it is that the process of doing memoing that is essential to the work of the GT researcher. Through the *doing* of memoing, the researcher captures ideas which seed the meaning analysis, and as Glaser explains, these become a “constant source of stimulation for meaning growth of emergent analysis” (p. 49). As the researcher works through the GT methodological procedures of constant comparison, theoretical sampling, and theoretical coding, the memos capture the ideas that emerge from this work. Memos, therefore are tracking the analysis and also sensitising the researcher to ideas that can eventually mature as the grounded theory research progresses. A key to understanding how memoing works is found on page 39: “To repeat, memos are the latent thought that collects concepts and puts substantive theory together as a vital ongoing procedure”.

*Memoing* is a welcome addition to the current list of GT publications. Since 1998, Glaser’s book *Doing Grounded Theory* has been one of the *go to* books for many researchers looking for practical advice on memoing. Although Chapter 12 of *Doing Grounded Theory* (Glaser, 1998) explains memoing concisely within the ten pages, Glaser’s 160 page book *Memoing* (2014) provides an expanded explanation of the original work including a scholarly discussion of the contemporary literature on memoing. This is particularly useful to GT researchers and scholars who need to discuss their research either at *viva voce* examination or at conference presentations.

In *Memoing*, Glaser’s thoughts on the procedure are gathered together into one book. The advice is practical and grounded in actual queries that GT researchers have asked Glaser at his workshops and seminars over the years. He covers the challenging

aspects of memoing such as sorting memos and provides 11 analytic rules to help guide researchers. There is always a risk that GT researchers can get lost in following such analytic rules, which is why Glaser's advice is to remember that:

...the world is empirically integrated, not logically modeled. GT is designed to tap this empirical integration. GT taps the multivariate social organization of patterned behaviour. To discover this integration is the GT researcher's work...The final integration from sorting is his theory of what is going on in a sector of social organization (p. 83)

is so important as an over-riding principle that guides the work of sorting memos.

Glaser highlights that memoing is not a standalone procedure in GT, but rather it is an integral part of the GT procedures. As GT researchers progress from sorting memos, the next step involves theoretical sorting. Again Glaser makes a key distinction that this involves conceptual sorting, the sorting of ideas and not data. Theoretical sorting of memos is vital in theory generation as the researcher moves the analysis from the level of description, to that of explanation, of how the concepts relate to each other and how they are integrated into a theory which accounts for how people process a problem. In this chapter on theoretical sorting, Glaser provides useful analytic rules for the sorting of memos which lead to theoretical integration. He also deals with the complex concept of completeness and its variant forms: theoretical completeness, comparative completeness, logico-deductive completeness, and scholarly completeness, which is especially useful for doctoral candidates who may need to be able to answer this question within their thesis.

To generate a substantive theory is a major challenge for any researcher. Yet it is the main objective of grounded theory and Glaser brings the reader to the final section of theoretical memoing. Here Glaser explains how memoing is used in the process of generating theory as memos are used to support the process of conceptualisation, identifying properties, considering relationships between categories, identifying clusters of categories and considering relationship with other theory. This level of conceptual, and abstract, work is challenging for most researchers and Glaser provides more practical tips on theoretical memoing. The first one, keep memos and data separately, sounds too simple, yet having firsthand experience of doing this during my own GT I can recommend it as a strategy which freed me from being bogged down with the minute detail of descriptive data to instead being able to work with the ideas that were captured in my memos and ultimately, enhanced my ability to develop a theory.

In the last chapter, Glaser returns to some key points on memoing to emphasise the importance of free-style, tracking ideas, interrupting coding to write down and capture ideas, and memoing to build theory. Memos are a core device that follow from the GT procedures and capture-track-preserve conceptual ideas. Glaser's parting advice, on avoiding technological traps of computer data management software, is sound advice to anyone who considers such programmes are a substitute for the intellectual requirements of theory generation. This book on memoing is full of practical advice for anyone doing GT research and focuses the spotlight on the power of memoing - a vital grounded theory procedure.

## **Book Review: Leaving Rules that Enforce Preconception**

Pernilla Pergert, Karolinska Institutet

Barney Glaser (2013) *No preconceptions - The grounded theory dictum.*

Mill Valley, CA: Sociology Press

Given that the dictum of *no preconception* is not new in GT, why did Glaser focus his attention so much on it to write a whole book on this topic? The dictum has been declared over and over again, for example in the chapter on *Generating Theory* in the seminal work of Glaser and Strauss (1967) and the chapters on *Reading the Literature* and *Forcing the Data* in Glaser's (1998) book entitled "Doing grounded theory." It might be reasonable, then, for a reader to ask why this book is needed and whether the dictum should not just be followed. The answer is that not allowing preconceptions to influence research is one of the greatest challenges and maybe even "the most difficult procedure of all" (Glaser, 2013, p. 133). Therefore, it is important to take it seriously; expanding on the issue is commendable and a welcomed contribution to the literature on classic GT.

In the first chapter of this book by Glaser (2013), the question why "no preconception" is a dictum in grounded theory (GT) methodology is answered. GT was discovered in a research field heavily focusing on testing hypotheses and verifying theories (Glaser & Strauss, 1967) and emerged as a complement through the conscious focusing on limiting preconception and discovering theory from the data. While both academic rules and the methodology of GT are there to facilitate excellent research, academic rules require the researcher to focus on learning from previous research and theories while GT procedures are used to handle previous research as possible preconceptions.

The aim of the book was to minimize preconception and Glaser (2013) wrote about "the importance of this book to try to stem the flow of preconceptions intruding in GT and affecting GT research" (p. 95). Thus, the dictum is *no preconception* and this is done, as repeatedly emphasized in the book, by applying "the rigorous steps" (Glaser, 2013, p. 2) of GT.

Preconception rules the world and is explained as an important aspect of everyday life and in every step of the research process including the formulation of a problem area, the substantive coding, the theoretical coding integrating the concepts, and the impact on the entire GT process (Glaser, 2013). The method for the book is presented in chapter 7 together with some of the memos Dr. Glaser received from colleagues on preconception. In the last chapter, the reader finds a theory by Kwok, McCallin & Dickson entitled "Working through preconception: Moving from forcing to emergence." This theory highlights the difficulties in staying open and is followed by an appendix written by Dr. Thulesius on his experiences derived from being a GT mentor. To minimize the preconceptions, Dr. Glaser is *incentivizing* the no preconception and *equipping* for emergence.

### **Incentivizing no Preconception**

In the book, Glaser (2013) encouraged researchers to stay open and endure the initial and fundamental confusion in the research process while using the comparative method; he promises that it will be rewarding. The presented incentives—motivating for staying open and suspending preconception—are attached to positive emotions and values including: *freedom from deduction, energy by autonomy, joy of discovery, and motivation from generating theory free of preconception.*

### **Equipping for Emergence**

Glaser (2013) equipped the reader for emergence by encouraging us to trust in the constant comparative method and in emergence. Emergence may sound as if it is something for which we need to wait, but while we wait, Glaser (2013) emphasized that we should employ the “rigorous steps” (p. 2) of GT and the constant comparative method without delay. Although counterintuitive to culture and life ways, Glaser (2013) stated that suspending preconceptions is easy early in the GT process. The researcher can trust that patterns will emerge; many GT researchers exist who can confirm the rewards of trusting the method (Pergert, 2009). Indeed, some confirmations are included as memos in the book. Thus, trusting the method and using the constant comparative method, will result in emergence.

However, no research is done in isolation; most researchers are a part of, and dependent on, the academic world. Therefore, the inherent conflict for supervisors and PhD students in trying to be faithful to the classic GT methodology in such a system that is ruled by preconception is presented.

### **Academic rules versus GT methodology**

Through his contrasting of academic rules and GT procedures, Glaser (2013) suggested that to truly handle preconception, one must leave academic rules and knowledge and go back to staying completely open for the time of doing the GT. He wrote that “It is often quite hard for the novice PhD candidate to do a classic GT dissertation without violating his local academic preconceptions from start of the research to its finish” (Glaser, 2013, p. 72). As readers, we are encouraged to be cunning; to give “lip service” (Glaser, 2013, p. 56) to the preconceived and then, when we have reached our goal, to forget all about it. This approach is unappealing, though it is probably what I did myself. I would like to think that it is possible to be faithful to the method while writing academically correct and exceptionally good proposals. In the appendix to Glaser’s (2013) work, Dr. Thulesius recommended to the reader to “write up some conceptual description in your proposal or application to make it more competitive and true to the GT perspective” (p. 166-167). Such advice is sound, as I want to believe that we just need to communicate in a language that is understandable in the academia.

I think that, with this book, Glaser (2013) contributed with a multi-dimensional view on preconception, not only being a consequence of the initial literature review but being present in every step of the research process, enforced by academic rules.

### **Comprehensive view on preconception**

Glaser (2013) has demonstrated and explained how preconceptions may be enforced at every step of the research process in using regular academic procedures. First preconception may occur in *the problem*—when a literature reviews is done to define the problem area; enforcing theories, and professional concerns. That literature reviews should not be performed before the start of research is a well-known GT rule that is probably possible to pursue, using the advice of Glaser and Thulesius presented above. Second, preconception may occur in *the questions*—in using interview guides covering all the professional concerns including face sheet information, such as gender, preconceived as relevant. I would assume that semi structured interviews are the most common in GT studies, but Glaser once again showed how predefined questions, based on previous research, risk introducing preconception. Third, preconception may occur in *the data collection*—in using sound recorders that risk delaying the early start of the constant comparative analysis. Fourth, preconception may occur in *the analysis*—in using computers that collect more interchangeable indicators than necessary, resulting in too much conceptual coverage and counteracting the precocious processing. The two last issues will be discussed below. Furthermore, Glaser (2013) did not mince his words when it came to the multi-version views of GT and especially the forcing of frameworks, epistemologies and theoretical perspectives, as for example the Constructivist GT of Charmaz (2006). Finally, preconception may occur in *the presentation*—in using analogies and diagrams that force conjecture, leaving the grounding in data. I had heard before that diagrams should not be used because it is impossible to control how people interpret them. In this book, Glaser (2013) argued that there is a risk that diagrams introduce the reader's preconceptions, which I think is worth considering.

Even though I do appreciate this extensive presentation of risks for preconceptions at every step, I also agree that it is not easy to follow, especially in the academic world. While Glaser (2013) is trying to free the researcher from the preconceptions of academia to become an open and autonomous researcher, he is presenting a quite strict position on how to reach that freedom throughout the entire GT process. I have chosen to briefly comment on two of these aspects that I believe that many researchers in academia struggle with, including the use of software in analyzing and the place of sound recording in data collection in GT.

#### **The use of Software**

Glaser (2013) stated that using computer software as a tool in analyzing hinders the preconscious processing. I believe that we all have different experiences and our creativity works in different ways, as does our preconscious processing; some of us are more computer literate than others. I have used a software program for coding; that is, I did the coding myself and the program helped me to collect all the interchangeable indicators of the same codes together. Furthermore, different codes could easily be merged together and with just one click I could go back to the ground data. However, I could see a danger for preconceiving the integration of concepts when using the coding trees for organizing before it had emerged (Pergert, 2009). I think that it is important to be aware of risks with computer programs but also to be open to the fact that they might work very well for some steps of the process of analyzing for some researchers.

### **The use of Sound Recorders**

In a previous book by Glaser (1998), the strong arguments against sound recording have been made: it prevents delimiting data collection and is unnecessary. In this book (2013), a new argument is presented and that is the risk for preconception because of the delay in the early start of the constant comparative method. I find myself trying to balance these different rules; to do academically accepted research and at the same time be faithful to the rules of classic GT. I have a student who used sound recording for interviews but at the same time took field notes to be able to analyze directly after the interviews without having to wait for the transcriptions. During her first six months of doing interviews and analyzing she felt very confused and as she was coding she was worried that it was only her own preconceptions. When her core category emerged she was able to go back to the first interviews to do a secondary analysis and she was delighted that she had recorded the interviews. Many academic arguments exist for sound recording, for example field notes could be viewed as biased and influenced by the researcher's preconceptions (Pergert, 2009). Furthermore, in the book on Doing GT, Glaser (1998) wrote that sound recordings could be an advantage, for example, when the data collection is not performed by a single researcher but in a research team.

Maybe, my shortcut in trying to please everyone in balancing the rules of academia and classic GT is in fact a detour? Thulesius wrote in the appendix to Glaser (2013) that the dictum is there to help the researcher to stay open and not to restrict. However, some kind of compromise is needed to use classic GT in academia, not only to get PhD students admitted but also to get funding and to publish. While I like how Glaser (2013) argued for what should be done to prevent preconception to intrude in classic GT research he has left it quite open to the researcher to decide how to balance the procedures of GT and the rules of academia.

### **Conclusion**

A choice of path is presented in the book (Glaser, 2013) when experiencing lack of control and confusion: to bail out by preconceiving—being safe, being knowledgeable and in control, or to trust the constant comparative method resulting in preconscious processing and emergence. In other words, the research would be experiencing the “full power of GT” (Glaser, 2013 p. 18. While Glaser wants to free us to be open and autonomous researchers, he presented a strict view on how research should be done. But, even if different experiences exist regarding the manner in which the balance between academic demands and the demands from the GT methodology should be handled, the dictum of no preconception is fundamental to classic GT, and definitely awarding. “Most researchers will when coding and analyzing go through the eureka effect of discovery and from then on suspending preconceptions becomes routine.” (Glaser, 2013, p. 11).

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## Book Review: Remodeling GT once again

Alvita Nathaniel, West Virginia University

Barry Gibson and Jan Hartman (2014) *Rediscovering Grounded Theory*  
London: Sage

In their book entitled *Rediscovering Grounded Theory*, Barry Gibson and Jan Hartman (2014) aim to present grounded theory in a new way with the intention of “forward looking preservation” (p. 237). They claim that *Rediscovery* is an outcome of many conversations in a London pub over the last eight years. The authors tackle both method and methodology as they meticulously describe the context of *The Discovery of Grounded Theory* (Glaser & Strauss, 1967) and take an authoritative stand on many of the controversies surrounding remodeling of the method in recent years. *Rediscovering* also includes substantial how-to sections corresponding to chapters in Glaser’s *Theoretical Sensitivity* (1978). *Rediscovery* adds explanatory depth in its discussion of the context of grounded theory, but fails to keep many of its promises.

*Rediscovery* is far reaching. Included in the first part are chapters entitled, *What Kind of Theory is Grounded Theory*, *Constructivism in Grounded Theory*, *Disentangling Concepts and Categories in Grounded Theory*, and *Coding in Grounded Theory*. These chapters describe the context of the method, discuss the controversies, and present Gibson and Hartman’s positions on contentious issues. The second part of the book consists of chapters that aim to help grounded theorists with procedures such as developing theoretical sensitivity, theoretical sampling, coding, memoing, and writing theory. To their credit, the authors continually acknowledge the originators of the method.

From the outset, Gibson and Hartman give credit to Glaser and Strauss. *Reinventing* acknowledges that grounded theory opened exciting opportunities for a new generation of researchers and perhaps even opened doors into new areas of inquiry (p. 29). As a new method, grounded theory’s emphasis was on inductively generating theory from data, rather than deductively verifying hypotheses. I agree with Gibson and Hartman that knowledge of the origin of a method and its terminology is imperative to rigorous research. *Rediscovering* acknowledges that Glaser and Strauss “discovered” grounded theory. *Rediscovery* also places classic grounded theory firmly within the zeitgeist of discipline of sociology at the time and describes its roots in the Departments of Sociology at Columbia University and the University of Chicago.

As Gibson and Hartman meticulously describe the history of the method, they also discuss changes from the original (classic) method that were developed by others in subsequent years. This “evolution” of grounded theory has been embroiled in controversy over what Glaser describes as “remodeling” of the method. Remodeling was begun by Strauss and Corbin and later by Charmaz and many others. *Rediscovering* clearly focuses on the original method as described in *Discovery*. Yet in an effort reminiscent of Rodney

King's famous plea, "can't we all just get along," Gibson and Hartman suggest that newer versions of the method, particularly Chamaz's constructivist version, depict a positive evolution. They go so far as to encourage alternative versions of grounded theory, stating that "methodological pluralism in grounded theory is something that should be welcomed" (p. 237). Paradoxically, the authors mention a more recent move toward the blending of grounded theory with other traditions, acknowledging that there is a risk that too many modifications will threaten to make the method "incoherent and contradictory" (p. 98).

Gibson and Hartman move beyond the discussion of the professors and universities that inspired Glaser and Strauss to delve into the modern etymology of the terms used in grounded theory. They closely examine common terms in grounded theory such as *concept*, *category*, and *indicator*. *Rediscovery* looks to Strauss and Corbin and others for distinctions between concept and category, delineating concepts as the basic building blocks of theory and categories as concepts grouped together—recognizing that categories are also "conceptual." In the end, they offer three distinctly different definitions of concepts and categories and a limited definition of term *core category*. They also examine various definitions of indicators, including distinctions between those that are expressive and those that are predictive.

Part two of *Rediscovery* is a how-to guide for novice grounded theorists. In the ten chapters (142 pages) of this section, Gibson and Hartman recount and expand upon classic grounded theory procedures as described in *Discovery* and *Theoretical Sensitivity*. In this section that is essentially a chapter-by-chapter expansion of *Theoretical Sensitivity*, Gibson and Hartman describe their own interpretation of ways to develop theoretical sensitivity and to theoretically sample, code, memo, and write grounded theory. To illustrate salient points, the authors chose eight exemplars of what "good grounded theory should look like" (p. 109).

Clearly, Gibson and Hartman have done the hard work of meticulously investigating grounded theory. They provide a comprehensive examination of classic grounded theory and present controversies that have emerged in the last forty years. The book will be useful to experienced grounded theorists who wish to gain a better understanding of the origins of method. It will also be useful to those who are interested in examining the controversies that have arisen over remodeled versions of grounded theory. However, the book may not be helpful to novice grounded theorists and PhD students.

As they carefully examine myriad opinions and contradictory definitions and methods, Gibson and Hartman have created ambiguity, which may confuse and overwhelm those seeking to learn the method, especially if there are no mentors available. In fact, many of the terms and procedures described in *Rediscovery* are contradictory to those found in classic grounded theory as described by Glaser and Strauss and later by Glaser. Following are two examples: First, Gibson and Hartman state that there are three major phases of grounded theory, one of which is selective coding (p. 163); whereas, Glaser, in *Theoretical Sensitivity* describes theoretical sampling as distinctively different from selective sampling (which is not used in classic grounded theory). Second, Gibson and Hartman give a common definition of core category, but fail to explicate the most important feature of the core category as described by Glaser—that it demonstrates how participants continually

solve their main concern.

I enjoyed reading *Rediscovery* because I am an experienced grounded theorist, interested in reading about all aspects of grounded theory. However, I find the book to be unnecessarily dense. It is not an easy read. Take for instance the section on theoretical coding. Gibson and Hartman devote nearly two pages to the topic without offering a clear definition. In contrast, Glaser is very clear that theoretical codes “conceptualize how the substantive codes may relate to each other as hypotheses to be integrated into a theory” (Glaser, 1978, p. 72). Glaser’s definition is clear, whereas Gibson and Hartman’s discussion obfuscates. Gibson and Hartman propose that, “The real test of our approach of clarification... is to make doing grounded theory clearer...” (p. 98). They fail their own test of clarification.

Although the authors are careful to continually refer to the work of Glaser and Strauss, *Rediscovery* mixes the method as described by many, gives contradictory definitions, and veers from the tenets of classic grounded theory. Gibson and Hartman accept the ideas of some and reject others, including Glaser and Strauss at times. They make pronouncements and act as arbiters of the method, essentially proposing yet another version of grounded theory. This ambiguity could serve to confuse and mislead a novice grounded theorist, who might assume the book correctly describes the classic method.

In conclusion, *Rediscovering Grounded Theory* is a scholarly compilation of ideas surrounding grounded theory. Gibson and Hartman carefully researched the origins of the method and the controversies surrounding recent remodeling. However, they present dense material that combines disparate ideas in a way that lacks cohesiveness and parsimony and contributes yet another version of the method. *Rediscovery* actually remodels once again. I recommend the book to those who are interested in an in-depth examination of the origins of the method. I do not recommend the book to inexperienced grounded theorists wishing to learn the method. Novices would be better served to read the original books by Glaser and Strauss and Glaser.

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**Ben Binsardi** is a reader in the Business and Management department at Glyndwr University. He completed his undergraduate and postgraduate studies at Texas Tech and Wichita State Universities. He then obtained a PhD from Loughborough, studying econometrics and undertook a Research Fellowship at the University of Oxford. Ben has published several textbooks and research journals in the areas of research methodology, marketing and finance. He is chairing a track at the Academy of Marketing Conference in July 2014. Ben teaches research methodology in conjunction with Jan Green. As a member of Grounded Theory Institute, Ben has been working with Jan Green and professor Andy Lowe to host a number of classic GT workshops at Glyndwr University which have attracted a pan-European attendance.

Email: [A.binsardi@glyndwr.ac.uk](mailto:A.binsardi@glyndwr.ac.uk)

**Berit Støre Brinchmann**, PhD, is a professor in nursing at University of Nordland and University of Stavanger in Norway. She is also a member of the clinical ethics committee at Nordland Regional Hospital in Bodø, Norway. Her research interests include health care ethics, medical ethics, research on next of kin and qualitative research methodology. Her PhD, from University of Oslo, Norway was a grounded theory study on proximity ethics in neonatal care.

Email: [berit.store.brinchmann@uin.no](mailto:berit.store.brinchmann@uin.no)

**Naomi Elliott** was awarded her PhD degree from Queen's University Belfast and holds professional awards of Registered General Nurse and Registered Nurse Tutor from the Nursing and Midwifery Board of Ireland. Her integrated clinical and research expertise draws from her experience at the different levels of healthcare: from policy-making whilst working in the Irish Nursing and Midwifery Board, and with the Department of Health and Children, to the design of professional education programmes, to clinical practice in Ireland, Scotland and New Zealand, as well as a diverse range of research methods across numerous healthcare related projects. She first met Dr. Glaser in 2002 during her PhD studies and now has several publications and research presentations on grounded theory. Naomi's current research interest is the development of new models of care delivery and quality in healthcare for major conditions such as epilepsy. Email: [naomi.elliott@tcd.ie](mailto:naomi.elliott@tcd.ie)

**Barney G. Glaser** is the cofounder of grounded theory (1967). He received his PhD from Columbia University in 1961. He then went to University of California San Francisco, where he joined Anselm Strauss in doing the dying in hospitals study and in teaching PhD and DNS students methods and analysis. He published over 20 articles on this research and the dying research. Since then, Glaser has written close to 20 more books using and about grounded theory and countless articles. In 1998 he received an honorary doctorate from Stockholm University.

Email: [bglaser@speakeasy.net](mailto:bglaser@speakeasy.net)

**Jan Green:** During a successful corporate career involved with mergers and acquisitions, Jan Green acquired extensive change management experience in the capacity as a practitioner and developed a deep insight into the diverse issues arising during change processes which were of value in her Masters study. A career move to academia resulted in Jan undertaking a classic grounded theory study into accomplished business performance. To support her thesis Jan attended two grounded theory troubleshooting seminars and she is a member of the grounded theory institute. More recently Jan has written and presented papers utilising classic grounded theory which conceptualise

concerns related to business competitiveness, the projectification of the workplace and manoeuvres which successfully support the impact of sudden change. She is the co-author, with Ben Binsardi, of *Research Methods for Management*, published in 2012. Email: [jan.green@glyndwr.ac.uk](mailto:jan.green@glyndwr.ac.uk)

**Alvita Nathaniel** is a nurse, educator, and ethicist. She is a Professor at West Virginia University School of Nursing where she has the position of Interim Associate Dean of the Graduate Practice Programs. In 1998 Alvita co-authored the nursing text book, *Ethics & issue in Contemporary Nursing*. This book is currently in its fourth edition and continues to be popular in the US and internationally. Writing the ethics textbook led to her grounded theory research on moral reckoning, which she continues to pursue along with additional publications focusing on nursing ethics.

**Pernilla Pergert** is an assistant professor at the Department of Women's and Children's Health, Karolinska Institutet and a pediatric nurse specialist at the Childhood Cancer Care Unit, Astrid Lindgren Children's Hospital, Karolinska University Hospital, Stockholm, Sweden. She got her PhD in Pediatric Science from Karolinska Institutet in 2008 using GT and she continues to teach, supervise, and use classic GT. She is the research group leader of the Childhood Cancer Health Care performing research in the two very closely related areas of intercultural nursing and clinical ethics in childhood cancer care. She is also a lecturer and course leader of a national education in Pediatric Oncology for Nurses and teaches in ethics and transcultural care. E-mail: [pernilla.pergert@ki.se](mailto:pernilla.pergert@ki.se)

**Henrik Sollie** is a psychologist working at the Child and Adolescent Mental Health Clinic at Kristiansund Hospital, Norway. He has also been working with projects regarding consumer satisfaction and cooperation between the special mental health services and the community services. His research interests are assessment, family dynamics, and comorbid problems related to child ADHD, and he is also working on a PhD degree at the Regional Centre for Child and Youth Mental Health and Child Welfare, in Central Norway. Email: [hesollie@online.no](mailto:hesollie@online.no)

**Isabelle Walsh** is full professor at Neoma Business School, France. She defended both her PhD and HDR (Habilitation à Diriger des Recherches) in Paris-Dauphine University, France. She teaches and does research in the fields of strategy, information systems and change management. She regularly organizes grounded theory workshops in France and the US. She has published several grounded theory studies in different top tier research journals, using both qualitative and mixed data: one of her published GT studies has won this year a best paper award. Email: [isabelle.walsh@neoma-bs.fr](mailto:isabelle.walsh@neoma-bs.fr)

**Barbara Yalof** holds a doctorate in educational technology and e-learning. She is a certified art teacher who has taught and co-led courses and workshops for teachers infusing technology in hybrid and online courses. She has produced digital graphics and illustrations, and enjoys investigating digital software including Web tools and apps related to teaching. She is a Blackboard Exemplary Course Reviewer and peer reviewer for several journals. Dr. Yalof is adjunct faculty in American College of Education's Online Master's Degree program in Digital Learning and Teaching. She works with teachers of various levels of experience to develop technology-rich curriculums that increase student engagement and shift more responsibility to the student. Dr. Yalof is also Academic Administrative and Technology Support Specialist at Harcum College. Email: [draw.art@verizon.net](mailto:draw.art@verizon.net)