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# B794 Intro to Qualitative and Quantitative Methods Winter 2020 Jan 6 – Apr 3

#### Human Resources and Management DeGroote School of Business McMaster University

#### **COURSE OBJECTIVE**

This seminar course provides students with an introduction to some methods commonly used in management research that fall under the umbrella of qualitative and quantitative research. The objectives are for students to become familiar with (1) what kinds of questions these methods can help answer, and (2) how to use these methods.

This seminar also provides exposure to research design and methods in business, psychology and the behavioural sciences more generally, with an emphasis on developing skills fundamental to designing and critically evaluating research projects, with an emphasis on a positivist and empirical paradigm.

#### **INSTRUCTOR AND CONTACT INFORMATION**

**Professors** 

**Trish Ruebottom** 

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Office Hours: by appointment

**Catherine Connelly** 

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Office hours: by appointment

Classes: Fridays 9:30-12:30 TSH 605

Note: Classes on January 24, February 21, and April 3 will be held in another location

#### **COURSE DESCRIPTION**

#### Part A:

The first half of this course is designed to survey the key methods that fall under the umbrella of qualitative research. It cannot be exhaustive, due to time limitations, but it will hopefully give you





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a taste of qualitative research and provide you with the orientations necessary to help you go further.

This course will be conducted as a seminar. There will be six three-hour meetings. Every week we will read some articles about the particular method or research design topic we are discussing. These will be complemented by a recent or classic article that illustrate the method or design. Through reading and discussing these articles, we will learn together about both the theory of how this is done, and how it is done.

Your weekly assignments and the data you gather to fulfill these assignments will culminate in a final assignment. I encourage you to pick a field site that interests you and that is related to your broader research interests.

In this course, the role of the professor will be to stimulate and guide student discussion. I will ask questions and encourage you to present, and support, different points of view in discussion.

#### Part B:

This half-course seminar provides an exposure to, and overview of, key issues, methods and approaches to conducting research from a positivist, empirical perspective. Six weeks constrains us to a highly selective readings list, with concentration on foundational topics with the understanding that you will need to continually learn new research methods for your dissertation and throughout your career.

In-class discussions contribute to the value you gain from this seminar, so it is essential that you come prepared, having read and reflected on the assigned manuscripts.

For the first half of each class, we will discuss the readings in depth. This is also a good opportunity for you to ask questions. Before the class break I will assign you the parameters for a new study that you will design that incorporates some elements of our discussion thus far. After the break, students will be asked to present their design, and they will receive feedback on the rigor of what they have proposed.

#### **LEARNING OUTCOMES**

#### This course will:

- 1. Test students' understanding of methods presented in the readings.
- 2. Develop skills in communicating ideas, in developing and presenting arguments, in listening to and understanding others, and in challenging others' views in a way that advances everyone's understanding.
- 3. Learn to think independently and critically: you will need to be able to analyze the methodological strengths and deficiencies of the articles that are being discussed, and how these methods issues influence the kinds of theoretical claims that can be made. These skills will be useful to you when you conduct your own research.



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#### REQUIRED COURSE MATERIALS AND READINGS

#### Books:

These should be available second-hand online.

Charmaz, Kathy. 2006. Constructing Grounded Theory.

Lofland, John, David Snow, Leon Anderson, Lyn Lofland. 2006. Analyzing Social Settings: A Guide to Qualitative Observation and Analysis.

Weiss, Robert. 1994. Learning from Strangers: The Art and Method of Qualitative Interview Studies.

S.G. Rogelberg (Ed.). (2004). Handbook of Research Methods in Industrial and Organizational Psychology. Blackwell Publishing Ltd.: Malden: MA.

#### **Articles:**

As noted in each class session. These are all available via the McMaster library system.

#### **EVALUATION**

There are two graded components to this part of the course. Students' grades will be calculated as follows:

Four Assignments	40%
Final Take Home Exam	60%
Total	100%

#### Conversion

At the end of the course your overall percentage grade will be converted to your letter grade in accordance with the following conversion scheme.

LETTER GRADE	PERCENT
A+	90-100
A	85-89
A-	80-84
B+	75-79
В	70-74
B-	65-69
F	0-64



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#### Four Assignments (4 x 10% = 40%)

Over the course of the term you will complete four assignments. These assignments are designed to help you practice using the methods and will help you work towards developing your final exam for the class.

All work must be completed independently. Each assignment is 1 page single-spaced and should be submitted to the instructor and your classmates **via email on the day before our class**, according to the order of the class schedule. Late assignments will not be accepted.

#### Part A:

I ask you to share your work with your classmates because an important part of learning to be an academic is learning from your colleagues' work and learning how to help your colleagues in their work. Part of every class session will therefore be devoted to helping each other advance your respective research projects.

#### Part B:

The goal of the assignments is for you to become adept at coming up with interesting research questions AND to know how to investigate them rigorously. Two of your assignments will be handed in (so that I can provide you with more detailed feedback), but we will also devote half of each class to similar exercises.

#### Final Take Home Exam (50%)

Your final assignment is a take home exam, similar to a comps question. You will be given a research topic and your task is to design a qualitative or quantitative study to address the topic. This will include creating a research question, describing appropriate methodology and data that will be gathered, as well as a detailed discussion about the rationale for each element of your research design (with citations as appropriate). The exam should be ~10 pages, double-spaced, in 12 point font.

The topic provided will give flexibility in potential research designs, so there are multiple directions that you could take. However, the exam will be graded based on the fit between the research question and the methodology chosen, coherence between the elements of the design you have chosen, and the strength of your rationale.

This exam is due one week after our final class meeting. No extensions are available except under extraordinary circumstances.







#### **ACADEMIC DISHONESTY**

It is the student's responsibility to understand what constitutes academic dishonesty. Please refer to the University Senate Academic Integrity Policy at the following URL:

http://www.mcmaster.ca/policy/Students-AcademicStudies/AcademicIntegrity.pdf

This policy describes the responsibilities, procedures, and guidelines for students and faculty should a case of academic dishonesty arise. Academic dishonesty is defined as to knowingly act or fail to act in a way that results or could result in unearned academic credit or advantage. Please refer to the policy for a list of examples. The policy also provides faculty with procedures to follow in cases of academic dishonesty as well as general guidelines for penalties. For further information related to the policy, please refer to the Office of Academic Integrity at:

http://www.mcmaster.ca/academicintegrity

#### MISSED ACADEMIC WORK

Late assignments will not be accepted. No extensions are available except under extraordinary circumstances. Please discuss any extenuating situation with your instructor at the earliest possible opportunity.

#### POTENTIAL MODIFICATIONS TO THE COURSE

The instructor and university reserve the right to modify elements of the course during the term. The university may change the dates and deadlines for any or all courses in extreme circumstances. If either type of modification becomes necessary, reasonable notice and communication with the students will be given with explanation and the opportunity to comment on changes. It is the responsibility of the student to check their McMaster email and course websites weekly during the term and to note any changes.

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repeatedly copy smaller sections of a publication that cumulatively cover over 10 percent of the total work's content. Please refer to the following copyright guide for further information:

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#### STUDENT ACCESSIBILITY SERVICES

Student Accessibility Services (SAS) offers various support services for students with disabilities. Students are required to inform SAS of accommodation needs for course work at the outset of term. Students must forward a copy of such SAS accommodation to the instructor normally, within the first three (3) weeks of classes by setting up an appointment with the instructor. If a student with a disability chooses NOT to take advantage of an SAS accommodation and chooses to sit for a regular exam, a petition for relief may not be filed after the examination is complete. The SAS website is:

http://sas.mcmaster.ca

#### RESEARCH USING HUMAN SUBJECTS

Research involving human participants is premised on a fundamental moral commitment to advancing human welfare, knowledge and understanding. As a research intensive institution, McMaster University shares this commitment in its promotion of responsible research. The fundamental imperative of research involving human participation is respect for human dignity and well-being. To this end, the University endorses the ethical principles cited in the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans:

http://www.pre.ethics.gc.ca/eng/policy-politique/initiatives/tcps2-eptc2/Default/

McMaster University has mandated its Research Ethics Boards to ensure that all research investigations involving human participants are in compliance with the Tri-Council Policy Statement. The University is committed, through its Research Ethics Boards, to assisting the research community in identifying and addressing ethical issues inherent in research, recognizing that all members of the University share a commitment to maintaining the highest possible standards in research involving humans.

If you are conducting original research, it is vital that you behave in an ethical manner. For example, everyone you speak to must be made aware of your reasons for eliciting their responses and consent to providing information. Furthermore, you must ensure everyone understands that participation is entirely voluntary. Please refer to the following website for more information about McMaster University's research ethics guidelines:





#### Page 7 of 16 https://reo.mcmaster.ca

Organizations that you are working with are likely to prefer that some information be treated as confidential. Ensure that you clarify the status of all information that you receive from your client. You **MUST** respect this request and cannot present this information in class or communicate it in any form, nor can you discuss it outside your group. Furthermore, you must continue to respect this confidentiality even after the course is over.





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	Course Schedule & Topics	Agenda
	<u>WEEK 1:</u>	Readings:
January 10 What are qualitative methods, and what are they good for?	Edmondson, Amy C., and Stacy E. McManus. "Methodological fit in management field research." <i>Academy of management review</i> 32.4 (2007): 1246-1264.	
		Charmaz, Kathy. 2006.  • Chapter 1. An invitation to grounded theory.  • Chapter 2. Gathering rich data.
		Lofland et al.  • Chapter 1. Starting where you are. Pg. 7-13.  • Chapter 2. Evaluating data sites. Pg. 15-32.
		Example study: Ranganathan, Aruna. "The Artisan and His Audience: Identification with Work and Price Setting in a Handicraft Cluster in Southern India." <i>Administrative Science Quarterly</i> (2015): 0001839217725782.
		<b>Preparation:</b> No assignment this week. However, please come having read all articles and with some notes about a research question that you would like to use qualitative methods to answer.
		Topics for class discussion:  • What are qualitative methods and what are they good for? In what ways do they differ from quantitative methods?  • What is "grounded theory"?
		<ul> <li>What are the main sources of data used in qualitative methods?</li> <li>What are the strengths and challenges associated with qualitative methods?</li> <li>How can we gain access to interviewees and field sites?</li> </ul>
		What are some ethical considerations pertinent to qualitative research with human participants?
		• What arguments does Ranganathan make? How are the methods (rather than just the findings) employed in the paper important to being able to adjudicate between different possibilities? Would her argument be feasible without the specific research design employed? What are some challenges and benefits of the research design described?
		In-class workshop: We will workshop your theoretical questions and help you refine them and begin to identify appropriate qualitative data sources and field sites so that you can make progress on this question ever the somester.

progress on this question over the semester.



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#### WEEK 2: January 17 Ethnography and Participant Observer

#### Readings:

Charmaz, Kathy. 2006.

• Chapter 4. Memo-writing. Pg. 72-95.

Lofland et al.

- Chapter 3. "Getting in." Pg. 33-51.
- Chapter 4. "Getting Along." Pg. 54-79.

Calarco, Jessica. Notes from the field: Show how you know what you know. <a href="https://scatter.wordpress.com/2018/11/06/notes-from-the-field-show-how-youknow-what-you-know/#comment-20078">https://scatter.wordpress.com/2018/11/06/notes-from-the-field-show-how-youknow-what-you-know/#comment-20078</a>

Example study: Mazmanian, M., Cohn, M., Dourish, P. (2014). "Shifting Sociomateriality in Space: Figuring, Configuring, and Reconfiguring in Planetary Exploration." *MIS Quarterly*, 38:3 pp. 831-848.

**Preparation:** For class, come having read the material. Also, please identify a problem of both theoretical and practical significance that interests you and that you hope to work on using qualitative methods. Identify one theory that your question is likely related to and explain how answering your question might advance this area of scholarship.

Assignment due two days before next class (Tuesday by 9:30am). Choose a site for observation, and complete two time periods of one hour observations. Write detailed field notes to capture your observation. Summarize your observations in a one-page memo comparing the two time periods, and include your field notes as an appendix. If your writing is legible, this can be a picture of your hand-written notes.

#### Topics for class discussion:

- · How can a scholar identify and gain access to a field site?
- How does one interact with others and manage one's identity in the field?
- How does one make observations, take notes, and write memos? What does it feel like to be observing?
- What arguments do Mazmanian and colleagues make in the article? In what ways are the ethnographic methods crucial to the authors' ability to make these arguments? How might you further test the arguments made in these papers? What methods might be most helpful in doing so?

#### In-class workshop:

You will spend time practicing your observational skills.





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#### WEEK 3: January 24 Interviewing, Part 1

### Readings:

Weiss, R. 1994. Learning from Strangers.

- Chapter 1: Introduction. Pg. 1-14.
- Chapter 2. Respondents: Choosing them and Recruiting Them. Pg. 15-38.
- Chapter 3. Preparation for Interviewing. Pg. 39-60.
- Chapter 4. Interviewing. Pg. 61-120.

Lamont, Michèle, and Ann Swidler. "Methodological pluralism and the possibilities and limits of interviewing." *Qualitative Sociology* 37.2 (2014): 153-171.

Example study: Pratt, Michael G., Douglas A. Lepisto, and Erik Dane. "The Hidden Side of Trust: Supporting and Sustaining Leaps of Faith among Firefighters." *Administrative Science Quarterly* (2018): 0001839218769252.

Assignment (due night before to me and your classmates): No formal assignment. However, come to class having identified up to five people who you think might be helpful in better understanding your research question, and who you think you could interview in the next week. Draft 10 questions to pose to them.

#### Topics for class discussion

- What kind of research questions can interviews answer?
- What kind of questions can interviews not answer?
- How can we identify appropriate interview samples?
- How can we design a useful interview guide?
- What argument do Pratt and colleagues make? In what ways is the method interviewing and the data it produces important to supporting their argument? What other kinds of data might you want?

#### In-class workshop:

You will have an opportunity to practice interviewing in-class. We will also workshop your memos, helping you consider who to approach for an interview and also helping you refine your interview questions.





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#### WEEK 4: January 31 Interviewing, Part 2

#### Readings

Weiss, R. 1993. Learning from Strangers.

• Chapter 5. Issues in Interviewing. Pg. 121-150.

Charmaz, Kathy. 2006.

- Chapter 3. Coding in Grounded Theory Practice. Pg. 42-71.
- Chapter 5. Theoretical sampling, saturation and sorting. Pg. 96-122.

Ashford, Susan J. "Having scholarly impact: The art of hitting academic home runs." *Academy of Management Learning & Education* 12.4 (2013): 623-633.

Assignment (due night before to me and your classmates): Complete one interview to better understand your research question. Write a one-page memo summarizing what you saw and observed, with some quotes from the interview, and what you think you need to understand next to address your research question. In your write-up include your interview guide as an appendix.

#### **Topics for class discussion**

- Strategies for growing your sample: focused vs. snowball sampling
- What do we learn from pilot interviews, and how can we incorporate that into future interviews?
- What makes for a "home run" paper?

#### In-class workshop:

We will workshop your interview memos, helping you to make sense of the data, and consider what best way to further build your sample.





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WEEK 5: February 7 Analyzing your Qualitative Data

#### Readings:

Eisenhardt, Kathleen M., Melissa E. Graebner, and Scott Sonenshein. "Grand challenges and inductive methods: Rigor without rigor mortis." (2016): 1113-1123.

Gioia, Dennis A., Kevin G. Corley, and Aimee L. Hamilton. "Seeking qualitative rigor in inductive research: Notes on the Gioia methodology." *Organizational research methods* 16.1 (2013): 15-31.

Deterding, Nicole M., and C. Mary. Forthcoming. "Qualitative Coding: A 21st Century Approach." *Sociological Methods & Research*.

#### Lofland et al.

• Chapter 9. Developing Analysis. Pg. 193-219.

Example Study: Kaplan, Sarah. "Framing contests: Strategy making under uncertainty." *Organization Science*. 19.5 (2008): 729-752.

Assignment (due night before to me and your classmates): None. Begin thinking about how you will analyze your interview data.

#### Topics for class discussion

- How do we make sense of and structure data? What is involved in coding?
- How can we represent data and the sense we have made of it to readers?
- Some current debates in how analysis is best done.
- What argument is Kaplan making? How does Kaplan represent data? How do the representations contained in the paper support or hinder the argument being made? What other representations of data might you want to see?

#### In-class workshop:

We will workshop your initial thoughts about analysis and help you think about how to move forward.





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WEEK 6:
February 14
Developing
Theory from
Your
Qualitative
Data.

#### Readings

Langley, Ann. "Strategies for theorizing from process data." *Academy of Management review* 24.4 (1999): 691-710.

Charmaz, 2006.

- Chapter 6. Reconstructing Theory in Grounded Theory Studies. Pg. 123-150.
- Chapter 7. Writing the draft. Pg. 151-176.
- Chapter 8. Reflecting on the research process. Pg. 177-end.

Pratt, Michael G. "From the editors: For the lack of a boilerplate: Tips on writing up (and reviewing) qualitative research." (2009): 856-862.

Example study: Scaraboto, D. and Fischer. E. 2013. Frustrated fatshionistas: an institutional theory perspective on consumer quests for greater choice in mainstream markets, *Journal of Consumer Research*. 39 (6) 1234-1257.

Assignment (due night before to me and your classmates): No assignment. Please come to class with all of your observation and interview notes for discussion.

#### **Topics for class discussion**

- How can we build theory from qualitative data?
- How can we construct our contributions and convince readers?
- How do Scaroboto and Fischer describe their data analysis and theory building? How does their description convince? How does this paper position and describe its contributions?
- Example papers and their utility in writing up?

#### In-class workshop:

You will have an opportunity to discuss your research so far and how to move it forward.

#### WEEK 7: February 21

**Reading Week: No class** 





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WEEK 8: February 28	MacKenzie, S.B., Posakoff, P.M., & Podsakoff, N.P. ( measurement and validation procedures in MI Incorporating new and existing techniques. M.	S and behavioral research:
Reliability and validity	Guion, R.M. (2004). Validity and reliability. In S.G. Ro Research Methods in Industrial and Organizat Blackwell Publishing Ltd.: Malden: MA.	
	Stone-Romero, E.F. (2004). The relative validity and empirical research designs. In S.G. Rogelberg Research Methods in Industrial and Organizat Blackwell Publishing Ltd.: Malden: MA.	g (Ed.). Handbook of
	Colquitt, J.A., George, G., (2011). From the Editors: F Topic Choice, <i>Academy of Management Journ</i>	
	Bono, J.E., & McNamara, G. (2011). From the Editors Research Design. <i>Academy of Management</i> 3	
	No assignment. Please come to class well-prepared	to discuss all the articles.
WEEK 9: March 6	Burton-Jones, A. (2009). Minimizing method bias thro	ugh programmatic research.
Method Biases and control variables	Conway, J.M. & Lance, C.E. (2010). What reviewers sergarding common method bias in organization Business & Psychology, 25: 325-334.	
	Podsakoff, P.M., MacKenzie, S.B, Lee, J.Y., & Podsa method bias in behavioral research: A critical recommended remedies. <i>Journal of Applied P</i>	review of the literature and
	Spector, P.E. & Brannick, M.T. (2011). Methodological of statistical control variables. <i>Organizational</i> 305.	
	Grant, A.M. & Pollock, T.G. (2011). Publishing in AMJ Academy of Management Journal, 54:5, 873-8	•

No assignment. Please come to class well-prepared to discuss all the articles.





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<b>WEEK</b>	10:
March	13

Considering the "level" of your unit of analysis

- Klein, K.J., Dansereau, F. & Hall, R.J. (1994) Levels issues in theory development, data collection and analysis. *Academy of Management Review*, 19:2, 195-229.
- Chan, D. (1998). Functional relations among constructs in the same content domain at different levels of analysis: A typology of composition models. *Journal of Applied Psychology*, 83(2), 234-246.
- Hofmann, D.A. (2004). Issues in multilevel research: Theory development, measurement, and analysis. In S.G. Rogelberg (Ed.). Handbook of Research Methods in Industrial and Organizational Psychology. pp 247-274. Blackwell Publishing Ltd.: Malden: MA.
- Johnson, R.E., Rosen, C.C. & Chang, C-H (2011). To aggregate or not to aggregate: Steps for developing and validating higher-order multidimensional constructs. *Journal of Business & Psychology*, 26: 241-248.

**Assignment (due night before to me)**: Provide me with a one-page proposal of a research study that you would like to conduct, that uses a quantitative method. You must include a title, theory, hypotheses, sample, analytical technique, and contribution.

#### WEEK 11: March 20

## Sampling (including ESM)

- Landers, R.N. & Behrend, T.S. (2015). An inconvenient truth: Arbitrary distinctions between organizational, Mechanical Turk, and other convenience samples. *Industrial and Organizational Psychology* (2015; March), 1-23.
- Cheung, J.H., Burns, D.K., Sinclair, R.R., & Sliter, M. (2017). Amazon Mechanical Turk in Organizational Psychology: An evaluation and practical recommendations. *Journal of Business & Psychology*, 32:4, 347-361.
- Uy, M.A., Foo, M-D., & Aquinis, H. (2010). Using experience sampling methodology to advance entrepreneurship theory and research. *Organizational Research Methods*, 13:1, 31-54.
- Beal, D.J., Weiss, H.M. (2003). Methods of ecological momentary assessment in organizational research. *Organizational Research Methods* 6(4), 440-464.
- Zhang, Y. & Shaw, J.D. (2012). From the Editors: Publishing in AMJ-Part 5: Crafting the Methods and Results. *Academy of Management Journal*, 55:1, 8-12.
- Sparrowe, R.T. & Mayer, K.J. (2011). Publising In AMJ-Part 4: Grounding Hypotheses, *Academy of Management Journal*, *54:6*, *1088-1102*.

No assignment. Please come to class well-prepared to discuss all the articles.





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<b>WEEK</b>	12:
March	27

Policy capturing and experiments

- Karren, R.J., & Woodard Barringer, M. (2002). A review and analysis of the policy-capturing methodology in organizational research: guidelines for research and practice. *Organizational Research Methods*, 5(4), 337-361.
- Aiman-Smith, L., Scullen, S.E., & Barr, S.H. (2002). Conducting studies of decision making in organizational contexts: A tutorial for policy-capturing and other regression-based techniques. *Organizational Research Methods*, 5(4), 388-414.
- Cooper, W.H. & Richardson, A.J. (1986). Unfair comparisons. *Journal of Applied Psychology*. 71(2), 179-184.
- Highhouse, S. (2009). Designing experiments that generalize. *Organizational Research Methods*. 12(3), 554-566.
- Aguinis, H., & Bradley, K.L. (2014). Best practice recommendations for designing and implementing experimental vignette methodology studies.

  Organizational Research Methods, 17(4), 351-371.

**Assignment (due night before to me)**: Provide me with a one-page proposal of a research study that you would like to conduct, that uses a quantitative method. You must include a title, theory, hypotheses, sample, analytical technique, and contribution.

#### WEEK 13: April 3

**Ethics** 

- Aguinis, H., & Henle, C.A. (2004). Ethics in research. In S.G. Rogelberg (Ed.). Handbook of Research Methods in Industrial and Organizational Psychology. pp 34- 56. Blackwell Publishing Ltd.: Malden: MA.
- Murphy, K.R. & Aguinis, H. (2019). HARKing: How badly can cherry-picking and question trolling produce in published results? *Journal of Business and Psychology*. 34: 1-17.
- Vancouver, J.B. (2018). In Defense of HARKing. *Industrial & Organizational Psychology*, 111:1, 73-80.
- Honig B. et al. (2018). Reflections on Scientific Misconduct in Management: Unfortunate Incidents or a Normative Crisis? Academy of Management Perspectives, 32:4, 412-442.
- Geletkanycz, M. Tepper, B.J. (2012). Publishing in AMJ-Part 6: Discussing the implications. *Academy of Management Journal*, 55:2, 256-260.

No assignment. Please come to class well-prepared to discuss all the articles.