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The Familiarization Study in Qualitative Research: From Theory to Practice

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From Theory to Practice

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ABSTRACT

This paper seeks to bridge a perceived gap in the literature on the methodology of qualitative research. The audience in mind are business and management students who are required to carry out field research as a part of their masters or doctoral degrees. After submitting a research proposal or candidacy, which sets out the research strategy in broad terms, students are characteristically faced with field work involving the collection of data from participants or respondents. Whatever thought and planning has been given to interviewing and questionnaires in theory, it is a necessity in qualitative research to adapt to the situation on the ground which is unique for every research.

The paper argues that this situation is not specifically addressed in the qualitative research literature. This activity is termed a 'Familiarization Study'. The elements of a familiarization study – procedures, content and theories – are discussed. The paper concludes with two cases of a familiarization study as a part of doctoral research. In the first case familiarisation focussed on the necessity for the research to interview in an unfamiliar and potentially hostile environment. The second case the researcher was faced with the task of developing practical procedures for the collection of data according to the exacting protocols of the discourse research method known as conversation analysis.

INTRODUCTION

> Sociolinguists treat language as an outgrowth of social categories. Researchers who embrace this perspective emphasize semantics or the lexicon that emanates from societal and structural differences; for example, socioeconomic class, education, or geographic location…Structural variables such as occupation, subculture groups, and hierarchical position also contribute to variations in linguistic repertoires (Putnam & Fairhurst 2001:82)

This paper focuses on the stage of research where the researcher is contemplating the first foray into data collection 'in the field'. It is written in a spirit of sharing our research experiences that led to our strong conviction about the need for, and value of, a familiarization or preparatory data collection which would precede a 'main' fieldwork study. When a researcher collects data from another person(s), a social interaction takes place. In other words, the researcher is engaged in social discourse. Very often, and perhaps this is more so within the business research setting, it is considered to be enough to make a distinction between quantitative and qualitative methodologies, arguments around these coming from the research literature (Denzin & Lincoln 1994; Denzin & Lincoln 2000).

We propose that within the activities of data collection, especially that using the face-to-face interview, are profound and complex issues. Many of these provide on-going debate within and outside of the traditional boundaries of social research. Our introductory quotation, for example, comes from the discipline of organizational communication (Jablin & Putnam 2001) and specifically, analysis of discourse. As we describe ideas coming from discourse analysis later, the fit with problems of entering field research becomes apparent. We recognize that almost all researchers, whether it is through processes of competitive grant applications or through processes of review of their doctoral proposals have gone through a rigorous appraisal process. However, this is often with a larger view, looking at the research as it stretches across several years. We have found from experience that once researchers and particularly research students have survived the defence of the evaluative process (and this goes by many names such candidacy, research defence or doctoral presentation) the initial relief can turn into the rather anxious "I have passed my test. How do I start my fieldwork"? This paper addresses this seemingly simple question.

Theoretical issues

We recognise that we have developed our insights against a practical and historical background. The following quotation captures for us, the essence of a combination of grounding data in respondents' own ideas and theories, whilst adhering to a systematic set of guidelines and procedures that are at one transparent and open to challenge.

> Grounded Theory served at the front of the 'qualitative revolution'. Barney G Glaser and Anselm L Strauss wrote *The Discovery of Grounded Theory* (1967) at a critical point in social science history. They defended qualitative research and countered the dominant view that quantitative studies provide the only form of systematic social scientific inquiry. Essentially, grounded theory methods consist of systematic, inductive guidelines for collecting and analyzing data to build middle range theoretical frameworks that explain the collected data. Throughout the research process, grounded theorists develop analytical interpretations of their data to focus further data collection which they use in turn to inform and refine their developing theoretical analyses (Denzin & Lincoln 1994:ix).

Fay (1996:1,5) captures resistance to the unitary position of quantitative research methodology and what social research should be about. "Throughout most of its history the basic question in the philosophy of social science has been: is social science scientific or can it be? [Now the question] ... ought to be whether understanding others – particularly others who are different – is possible, and if so, what such understanding involves?". Social researchers are not mere observers of totally independent objects, but active shapers of what they study with the result that interviews are socially interactive. They are, suggests Fay (1996), dynamic and continuing (hermeneutic) with an obligation for the researcher to be reflexive. We argue strongly in this paper that, alongside the task of being 'active shapers' comes the task of doing all one can to make sure that the shaping is not in the researcher's own mould.

This issue – understanding others and what they mean when they respond to an interviewer – has received extensive attention and debate in the literature of qualitative research. Denzin and Lincoln (1994:353) in their *Handbook of Qualitative Research* clearly set the scene:

> The constructionist (and constructivist) position tells us that the socially situated researcher creates, through interaction, the realities that constitute the places where empirical materials are collected...

This raises the question "What are the 'realities' of where empirical materials are to be collected and how does the researcher identify them?" We need to explain here how we are construing the concept of 'empirical'. To us it simply means data and other materials that are collected in the field and within the research context.

Researchers, even within the almost anthropological, ethnographic perspective have to face these 'realities'. While privileging data collection based on observation, ethnographic research is said to include interviewing because "even studies based upon direct interviews employ observational techniques to note body language and other gestural clues that lend meaning to the words of the persons being interviewed" (Angrosino & Mays de Pérez 2000:673). Situational identity – the way researchers interact with their respondents – is of prime interest to contemporary ethnography.

> People come into interactions by assuming situational identities that enhance their own self-conceptions or serve their own needs, which may be context specific rather than socially or culturally normative (Angrosino & Mays de Pérez 2000:689).

This principle of social interaction identifies the familiarization study as a critical component to the success of subsequent fieldwork. If the researcher fails to consider such issues as class, race, gender, ethnicity and other factors discussed below, then inevitably the results may well reflect his or her views, rather than those of respondents. Interviews in qualitative research have been classified, on the basis of the method literature, into three types (Alvesson 2003). We argue that a familiarization study is desirable across the full range of interview types, not all of which are discussed here.

The first type is affiliated to the neopositivist position, which assumes that there is a reality 'out there'. The charge has been made that this is evident in some of Glaser & Strauss' (1967) explanation of their grounded theory method. The neopositivist position seeks to establish reality "out there" by following protocols aimed at minimising researcher influence and aiming at "objectivity" and "neutrality". Charmaz (2000:529) labels this approach "objectivist grounded theory" and notes that it "adheres closely to positivist canons of traditional science. Having said this, the very strong imperatives of letting respondents' theories emerge, beg the question about whether the problem lies more in the specification of research activities described by Glaser and Strauss (1967) than in their intent to support the

neopositive position that there is an 'out there' reality. We are encouraged to make this suggestion in the light of the continuous rejoinders of Glaser (1992, 1998) to Strauss and Corbin's (1990) research practices within the grounded theory nomenclature. We would argue that whether Charmaz (2000) is plausible or not, many grounded theorists aim to penetrate the perceptual world of respondents as the respondents represent it.

A second type of interviewing is labelled "romanticism" by Alvesson (2003) as it emphasises interactivity, rapport and closeness with participants. Silverman (1993) calls this "interactionism" or the "humanist position" with open-ended interviews which seek to allow participants to define their unique ways of seeing the world. Popular with research students, Fontana & Frey (2000) is a standard text with synopses of seven basic elements for unstructured interviewing with references for detailed accounts. These "elements" overlap substantially with the activity of the familiarization study described below, and this paper encourages comparison with Fontana & Frey's (2000) work. Their practical advice corresponds with their more theoretical approach of a constructivist grounded theory as advocated by Charmaz (2000:525) who stresses the ideal of "intimate familiarity with respondents and their worlds" which involves looking for "views and values as well as acts and facts". We believe that if this is to be achieved, careful preparation through a familiarization study is essential.

As promised earlier in the paper, we go outside the traditional social research literature to talk about the theory of sociolinguistics as it is considered within the domain of discourse analysis. We argue that language plays a central role in the researcher/respondent interaction. Later in this paper, we list some of the familiarization elements that we have learned to map into our familiarization studies. Semantics is a strong element in the process. Going a little deeper into this, we see that from a sociolinguistic perspective, language is a system or code where members defend their identities as members of their 'communities' (whether these are organizational or personal. In the case of business or organizational research, there is an interesting dynamic.

> Discourse indexed social structures, define communication styles; and emanate from training, enculturation, and class systems that operate within and outside of the organization. In many ways, language as an artefact of organizations reflects occupation, department and organizational role (Putnam & Fairhurst 2001:32).

It might appear from this that all it takes to become familiar with the language of the respondents is to analyze the role, department or system of interest to the study and the researcher can hopefully attain enough linguistic sensitivity to make respondents comfortable. However, structural sociologists (Blau 1964, 1970) have long maintained that existence of organizational structures and other cultural artefacts take forms so static that language forms, like structures can be regularized. That this impresses us as researchers is very evident in our insistence on formal language within the questionnaire format. The sort of linguistic preferences of figurative or folkloric language users do not appear in many published works, even when it is important to penetrate their worlds of meaning (Ricoeur 1981; Gabriel 1991, 1998; Salzer-Mörling 1998). This is not always the case as reported by Putnam and Fairhurst (2001). They talk about the slang that is often used within 'insider' settings. These are lexical patterns produced by a community of people as their own. It seems from the reports of researchers in Putnam and Fairhurst (2001) and other discourse theorists in Grant, Hardy, Oswick and Putnam (2004) that people (our potential respondents) have developed sophisticated and fluid capabilities of 'switching linguistic codes' to adapt to the different cultural settings in which they find themselves within the work context. Although the theory is only briefly alluded to here, our purpose in drawing attention to it was that some areas outside the research literature can provide information that could be very valuable to the familiarization study.

A third type of interviewing arises with the adoption of a theoretical perspective based on ethnomethodology and conversion analysis. Labelled "localist" by Alvesson (2003) on account of its perceived limitation, the aim is to record and analyse naturally occurring interaction, generally without the presence of the researcher at all. This approach is not widely favoured by student researchers in the field of business or management at the time of writing but it has certainly been demonstrated that an explicit familiarization study is essential before fieldwork based on the ethnomethodological perspective is carried out (Whiteley 2002).

Summary so far

While the literature does not seem to explicitly suggest a familiarization study as a distinct and discrete activity which precedes the main field study of data collection, every account of interviewing, both theory and practice, stresses the importance of reflexive preparation. The literature sources quoted above generally include examples of context and adaptation of

interviewing from field studies and the message is clear: no two researches are the same so that it is incumbent on the researcher to 'do his or her homework'.

The idea of writing a paper under this title - The familiarization study – arose partly from the practical necessity of preparing doctoral students for fieldwork and partly from the conviction that the implementation of qualitative research on site depends substantially for its quality on the way it is set up in the first place. The scholarly literature supports this notion and contains repeated references to the nature of the activity. For instance, "...in qualitative research, what happens 'in the field' as you attempt to gather data itself is a source of data rather than just a technical problem in need of a solution" (Silverman 2000).

For substance, we call upon our experience of fieldwork preparation to introduce methods and techniques which have proved valuable and we have endeavoured to express these as a theoretical interpretation which relates the familiarization study to a simple model of our understanding of the process of social research.

THE NEED FOR A FAMILIARIZATION STUDY

Our first comment on this is to reflect that the familiarization study entails an almost hermeneutic approach. As far as is possible at the time, a holistic vision of the study is needed. To conduct a familiarization study requires much thinking, planning and research activity within the research context. Such time, effort and analysis means that strong justification is needed, if only to the researcher him/herself, for expending the resources on what is sometimes a less visible part of the research reporting. Why do it, a researcher may ask? Who is going to benefit from it? Can the data be used in a substantive way or is the activity just chalked down to preliminary enriching experiences for the researcher? (We emphasize the 'just' word that indicates a more superficial understanding of the possibilities arising from the familiarization study). Some of the answers to these questions depend on the research circumstances. There will be times when an answer to these question can only be found from an evaluation of the specific research project (bearing in mind the iterative nature of many qualitative studies).

Certainly we learnt the hard way. In the case study carried out in 1987 and reported here, both the experience and content of the familiarization study (called preliminary fieldwork in the

actual published Ph.D.) were detailed. In spite of the extremes of time, resources and personal development of the 'YTS' familiarization, reported below, data emerging from this phase of the research were reported as anecdotal. They were not included in the account of the main study in which face-to-face interviews with 'low achieving, succeeding trainees and trainers' provided the source of data and discussion. In some of the current studies being undertaken by us, it will be appropriate to detail substantive data from familiarization findings because they have been used to design the next stage of data collection and so they have become part of the audit trail so necessary to rigour in qualitative research (Whiteley 2002).

In addition to the theory introduced above, there are two foundational assumptions of qualitative research and particularly concerning the face-to-face qualitative interview. The first is that the more comfortable the respondent is and the closer the researcher can come to his/her ways of communicating, the more likely it is that the quality of data will be improved. This is, of course, providing that certain conditions are also satisfied. These would include designing emergence into the interview schedule and asking questions or focal points that are relevant and appropriate to the phenomenon being studied. The second deep assumption is to recognize that from the beginning, the research context in qualitative research is best considered as a mystery. By identifying clues preparatory to conducting the main investigation, at least some insight can be gained about how to choose amongst the many approaches open to the researcher. The notion of a familiarization study entails visualization of the proposed research context in such a way that recognition is made that very often, the researcher's knowledge of the context, that is the 'inside' environment, can be improved.

In our experience there are two distinct types of familiarization studies – but there may easily be others.

The first we term 'immersion by osmosis'. An example is the study of Australian waterfront workers (wharfies). The waterfront study was reported in Whiteley & McCabe (2001) and Whiteley & Whiteley (2004). Here the researchers visited the waterfront several times, accompanied by, on separate occasions, a friendly safety officer, a retired waterfront worker and the human resource manager, all of whom showed a different aspect of waterfront life. The idea was to let the atmosphere, informal customs and practices seep in to the researchers' consciousness. Gradually, jokes and stories were shared and mention of these gained almost immediate 'insider status'. As crises were always happening, some knowledge of these,

expressed in sympathetic ways, suggested that there was researcher interest in how things were. It became essential to learn such literature as the poem of "*The Hungry Mile*" (Whiteley & McCabe 2001) because the study was interested in historical as well as current data. Even after the immersion stage, the preliminary fieldwork, consisting primarily of focus interviews, took 14 months. On reflection, we still maintain that it was the efforts we were prepared to make (and be seen to make) that allowed us to collect the data we did.

The second type of familiarization is described in detail in the first case study to follow. This was a more planned type of familiarization. It was directed by the needs of the data collection methods, the profile of the researcher versus those of the respondents and the needs dictated by those theoretical perspectives directly used in the study.   The researcher had some exposure to sociolinguistics although in the 1980's it was not as well incorporated into discourse as it is now. Even if she had not, there was an intuitive recognition that she was not well placed to enter into the 'community of trainees' as a middle-aged researcher. In both types of familiarization, the researcher aimed to become familiar with issues that operated from the inside, in an emic sense (Brislin 1976; Whiteley 2001)
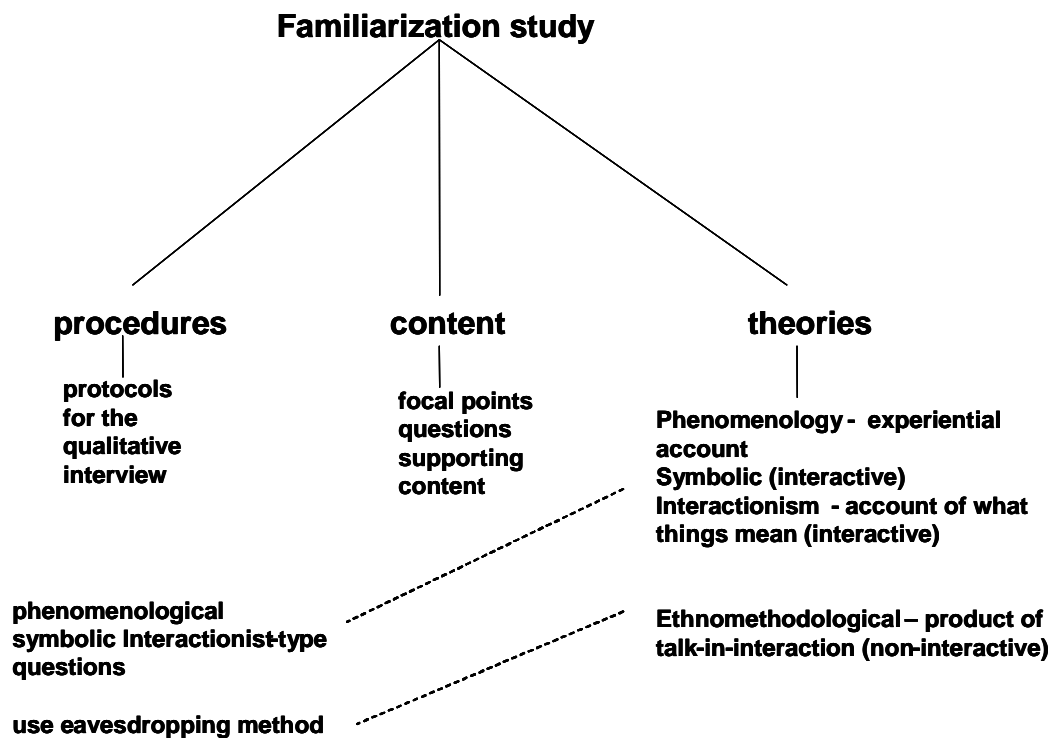
ELEMENTS IN A FAMILIARIZATION STUDY

In our experience the nature of the familiarization study and the job to be done can be clarified by considering three essential elements. These are procedures, content and theories which are modelled in Figure 1 below.

Procedures

Physical procedures for data collection, such as identifying respondents and contacting them, are generally obvious from the start. Indeed, sometimes preliminary field work goes very little further than these practical organizational issues with the quality of data collected unknown and possibly dubious.

We believe there are two possible ways for researchers to decide upon the procedures they will use when conducting face-to-face interviews. One is to combine researcher skills with advice from the literature and from this combination, choose the best fit. As a starting point a valuable checklist, based on scholarly literature is provided by Fontana & Frey (2000).

Figure 1 Elements of a Familiarization Study

Familiarization study

procedures   **content**   **theories**

protocols for the qualitative interview

focal points questions supporting content

Phenomenology - experiential account
Symbolic (interactive) Interactionism - account of what things mean (interactive)

phenomenological symbolic Interactionist-type questions

Ethnomethodological – product of talk-in-interaction (non-interactive)

use eavesdropping method

The basic elements of unstructured interviewing are described by Fontana & Frey (2000) are:

- Accessing the setting;
- Understanding the language and culture of the respondents;
- Deciding on how to present oneself;
- Locating an informant;
- Gaining trust;
- Establishing rapport;
- Collecting empirical materials;

A second way is to build on these standard procedures by gathering data from respondents and also others close to the research environment and using this data to inform the protocols to be adopted. In some cases, there may be conflict.

In the first case study reported below, a very difficult decision had to be made about swearing which was used freely by respondents for many purposes. These ranged from affection to insults to everyday descriptions. Not only was the decision about whether to use swearing in asking questions or for accounts of respondents' experiences, but also it raised the question of

the researcher's relationship with respondents. There was a very real danger that the researcher would appear patronising. In this particular study and in a more practical sense, the data would indicate how close or apart from the respondent to be; what acceptable body language could be used; how to talk to same or other gender; how to become sensitive to signals that status may be an issue and, all-importantly, what was the optimal timing for parts of the interview or the interview as a whole. When we describe the cases, we will see that In the second case study, procedures and data collection protocols were predominant.

Content

It has been our experience, and possibly that of other supervisors of qualitative studies, that a popular question at a research candidacy is to ask "Can you tell us the sort of questions you will be asking"? As the researcher usually submits the research proposal before the familiarization study has been conducted, this is a difficult question to answer. This is particularly the case when the research is a grounded one, either following grounded theory (Glaser & Strauss 1967) or grounded research (Whiteley 2004).

The question is, of course, reasonable for any study adopting a postpositivist paradigm (Lincoln & Guba 2000) but within the constructivist perspective, issues going into the study are held to be tenuous and unclear. What seem to be problems might, to respondents, be symptoms of what they might call their 'real' problems or issues. In couching questions in terms of the seeming problems, there is a risk of confirming the researcher's own version of reality within the research context. A great benefit of constructivist research is that it is possible to be guided, and to continue to be guided by respondents' own 'theories'. This includes theories about what the important questions and issues should be.

The data from a familiarization study will, almost above all, move the researcher into the respondents' issues around the broad research topic (which we call the formative idea). The value of the content of familiarization data can hardly be underestimated. It is a major source of data upon which to formulate questions, select data collection methods and plan data analysis. For example, on the bases of the familiarization study, narrative may be a good way to encourage respondents to talk about the context. Thematic analysis will be selected to match narrative data. There is a direct relationship between theoretical perspectives and interview questions. Phenomenological questions would elicit answers to "how it is/was", Symbolic interactionist questions would elicit meaning "what was the meaning you attached

to how it was?" (see Whiteley 2004: 33). Content analysis would be appropriate for both kinds of question, but the researcher may decide to (at least initially) divide the analysis into categories of experience and meaning.

In the second case study described below a scenario (an alternative to interactive interviewing) was adopted to focus a discussion. The position of the researcher needed to be neutral, as directed by the theory of conversational analysis. Conversations were 'eavesdropped' so social groupings such as age, gender or occupation were not an issue of researcher 'fit'. There could be no answers to elicit, but instead conversational structures were sought arising from the participants' discussion (Psathas 1995)
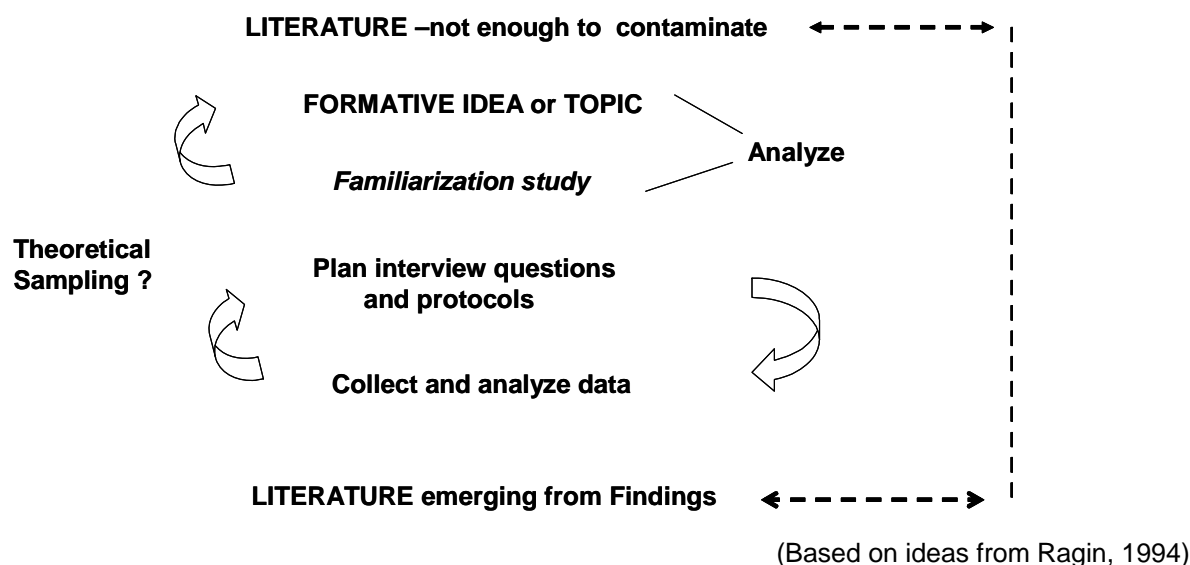
Theories

For the purpose of illustrating the contribution of theory to familiarization studies we have inserted into Figure 1 the three sociological epistemologies adopted by the three case studies referred to in this paper.

These were the phenomenological perspective where the task was to elicit an account of 'lived experience' as it occurred to the respondent (Whiteley & McCabe 2001) The second was the symbolic interactionist perspective where the task was to investigate the meaning behind some of the training activities of the youth training scheme and those involved in administering them (Whiteley 1987). The third perspective followed the approach of ethnomethodology (Garfinkel 1967). The researcher simply wanted the respondents to talk, without his presence, so that he could 'observe' (by listening after the event) the product of talk-in-interaction (Whiteley 2002).

We found that regardless of theoretical perspective, the familiarization study was essential. Indeed, we suggest that the quality of our work would have been seriously impaired without the extensive, and sometimes tedious, foundation established through this exploratory field exposure. Another important role for a familiarization study is that of testing the initial formative idea or research question. This is especially the case in an iterative research design as shown in Figure 2 below.

Figure 2   **A Qualitative Research Design**

LITERATURE –not enough to contaminate ← – – – – →

FORMATIVE IDEA or TOPIC

Familiarization study   **Analyze**

**Theoretical
Sampling ?**

**Plan interview questions
and protocols**

Collect and analyze data

LITERATURE emerging from Findings   ← – – – – – →

(Based on ideas from Ragin, 1994)

At the time of the research reported in our cases, we were not so aware of the role that the 'epistemic lens' connected with sociological theories played within the researcher's decision making (Whiteley & Whiteley 2004). We have briefly described earlier that each perspective is interested in a particular stance for the respondent to applying a different set of rules and preferences for gathering and analysing data. Fortunately, the grounded theory method (Glaser and Strauss 1967) with its strongly emergent "follow the respondent" principles, allowed what we now identify as phenomenological and symbolic interactionist interests to be served. This was almost accidental however, and at our current stage of development, we would be more intentional and discriminating about the types of question to be asked, given the 'lenses' we wanted to ask respondents to look through. Furthermore, the current scholarly emphasis on expanding the boundaries of discourse research (Grant et al. 2004) appears to be giving increasing legitimacy to the 'localist' interviewing identified by Alvesson (2003) and opens up the potential for improving the quality of research in unfamiliar cultures, especially overseas.

THE IMPORTANCE OF FAMILIARIZATION: TWO CASE HISTORIES

CASE 1   Understanding the Other

The Background

This study, entitled *The Low Achiever in the Youth Training Scheme (YTS),* was supported by the Manpower Services Commission in England and, in parallel, was undertaken as a doctoral study at the University of Newcastle Upon Tyne (Whiteley 1987).

The initial interest for the researcher arose from statistics reported by the (then) Manpower Services Commission (MSC) which played a leading role in providing training for sectors of the national UK employed and unemployed communities. Handy (1984) indicated that many youth trainees were failing their training courses which clearly concerned the MSC.

There were indications that there was a connection between formal education ability and failure. Although the concept of 'low achiever' was considered to be highly problematic, not least because of the threat and consequences of labelling (Becker 1963), an attempt was made to operationally define the low achiever as not having achieved three subjects in the Certificate of Secondary Education (CSE) at that time. It needs to be mentioned that the categorisation was considered to be problematic throughout the study and when talking to trainees, the researcher made every attempt to 'bracket' the categorization.

The study was conducted in the North of England mainly because in this heavy industrial area almost every sector, including service and light industry, was represented. The radius for the study was around 50 miles of the coastline between Newcastle Upon Tyne and Middlesbrough in Teesside. It was intended to target three groups of respondents: 'low achievers' who were not succeeding, trainees who were on a success track and trainers close to both groups of trainees.

A qualitative study was planned, using grounded theory principles and methods (Glaser & Strauss 1967). A major data collection method was the qualitative interview (Whiteley et al. 1998). The researcher could hardly have been more distant from the research context and in particular from the type of respondent being studied. She was over 40 years of age and the usual age of youth trainees was 16-20 years. She was a graduate in tertiary education and the

study investigated academically low achievers. She was female and there was a high incidence of male youth trainees. Her experience was in the human resources, administration and sales fields and there was a strong focus on the trades areas which is where many low achievements were recorded.

Familiarization

Two types of familiarization were conducted. One was with those who influenced in some important way, the training curricula, context, policy formation and implementation. These included manpower services staff, the managing agents who represented the YTS on-site, critics of YTS and people recommended as being knowledgeable in some way about the history of YTS and its implementation. This was the 'immersion by osmosis' referred to earlier. The difference between this and the more definable and purposive familiarization is that the data are impressionistic and intangible. As with any exposure to the research context there are benefits but also dangers involved. The benefits were that a working knowledge of the YTS and its administration hopefully of the sort that would be detectable by respondent trainees and trainers. The dangers were that this knowledge could contaminate the researcher, perhaps resulting in the asking of questions in a partisan way. This would, perhaps, favour the preconceptions of the administrators and officials responsible for the operation of the scheme. This was well recognized by the researcher and to counter the dangers, field notes were kept to a minimum and the data from these contributors were not published or used as substantive data in the research report.

The second familiarization was more dramatic. Fortuitously, as well as the YTS opportunity for young people there was an adult training strategy (ATS). Here, people who did not have the opportunity for an apprenticeship or needed to retrain could join a training scheme such as offered by the YTS. The researcher was able to negotiate 'entry' into a selection process where applicants had several weeks experience in a safe but realistic environment. They were to be tested for suitability and allocation to various training venues. The researcher joined this process and to all intents and purposes became a trainee. The training environment included several types of practical activities including working with tools ranging from lathe machinery to woodworking tools. As this was where the biggest 'unknown' area for the researcher, the experience was going to be very useful. There was a latent benefit which arose from the researcher being naturally very poor and inexperienced at such practical work. She became 'adopted' by the trainees, shielded from the critical eye of the trainers and often

protected from her mistakes. This remarkable experience gave insight into the culture of camaraderie that existed especially within the low achieving trainee groups.

The Elements of Familiarization in This Study

Being a trainee and a low achiever, throwing herself into the role of participant observer, the researcher was confronted by a range of problems to be solved on a daily basis which today she is able to formalise under the notion of a 'Familiarization Study'. With hindsight, and for the purpose of sharing practical knowledge, the elements of familiarization in this study are presented and described under the headings in Table 1. In a sense, this table is artificial because categories overlap and merge. Sometimes they challenged the researcher all at once.

Table 1

Interview procedures	Communication and Language
Proxemics	Speech community (dialect)
Non-verbals	Vocabulary (slang)
Gender	Semantics (meanings)
Status	Sociolinguistics (swearing)
Age	Paralinguistics (tone of voice)

Interview Procedures

On the proxemics front we learned that there was indeed an 'invisible circle' in terms of space. The smallest was about a metre and when a topic was controversial there was a 'face-off' posture. The body language was complex and even after several weeks as a trainee the complexities were not fully realized. One of the more meaningful actions was the punch on the upper arm. This had its subtleties. At a certain intensity and when accompanied by a certain facial expression, the punch could mean a gesture of approval or affection (in the male case of a manly type). At a different level and with a different facial gesture, the punch might signal a warning. This also could vary in degree. The gesture might indicate – watch out, you are breaching certain boundaries. Alternatively it might indicate that you have gone too far and this is a (not too friendly) warning. At a deeper level things could be a little more serious and implicit arrangements may be en train to square off for an actual confrontation. Shrugs fell into the same category. These were extremely complex. It was not always possible to tell from the actual shrug what was going on and the theory of symbolic interactionism comes to

mind vividly (Blunt 1988; Blumer 1969; Mead 1963, orig. 1934). The meaning attached to shrugs could vary including fatalistic, frustrated, let it go, 'who cares a f*ck' or, in many cases, its not of consequence. When faced with a shrug in the interviews carried out later, the researcher was careful to go through a repertoire of comments to clarify, confirm or explore the meaning. There were many elements to this dimension but these serve as examples.

Gender did not present so much of a problem in the familiarization study as it did once out in the research setting. This reminds the researcher that not everything can be learned within the familiarization activity. As a trainee (the researcher also completed a week at another venue as a trainer, under supervision) it seemed that it was so almost bizarre to have an older inept person amongst the training group that the gender issue was just part of the general anomaly. However, out in the field it was a different story. Gender was more important than the researcher at first realized and for an interesting reason. For rigour purposes, selection of actual respondents was made by the liaison person from MSC. There were many research sites ranging from service organizations, retail and construction sites. The construction-type sites proved to come with gatekeepers. Females were not part of the natural scene. Resistance ranged from attempts to abort the visit altogether to pointing out difficulties such as climbing scaffolding-type structures to exposing the researcher to the pithy language of site cabins. Considering the familiarization experiences, none of these were off-putting, but care needed to be taken to walk the masculine/feminine line in such a way that acceptance could be gained.

Status (as far as could be ascertained) did not prove to be the problem it might have been. As a trainee, care was taken to dress the part and, as soon as could be done to follow the speech and attitudes of the group. On a more personal level, there was almost a schizophrenic effect when such things as disciplinary warnings (such as joining the group in a banned 'smoko') happened. This infringement was the worst experience for the researcher as the status of a responsible person was at war with the status of trainee. We had, there could be no doubt and this seemed in keeping with trainee tradition, pushed the boundaries of what was considered to be approved behaviour. All that could be done was to dress appropriately for the site, use language that reflected the situation and continue to improve and modify as more experience was gained.

Age proved to be more an issue for the researcher than the respondents. Constantly aware of the generation gap, she was often reminded of this in the most dramatic way. For example, the training day typically started off with a roundup of the latest sex, blood guts and thunder videos watched the night before. The silence coming from the researcher 'trainee' was soon noticed. When confronted (in the extreme sense of the term) she had to admit to not owning a video machine. Instantly, trainees from all over the workshop were mobilized and suggestions for 'finding' a machine which had 'dropped off a lorry' became the focus of heated debate. Not all suggestions were possible within the law and this proved to be a tricky time. Only the promise to borrow one from an 'uncle' averted group action. The other element of age and this may have been bound up with gender and a general hopeless performance at the skills level, the researcher got the feeling of being adopted and protected. A salutary lesson occurred not so much concerning age as the generation gap. A 'reasonable' assumption was made that some of the important things to trainees (and to trainers) were things to do with tasks, behaviours, ability, and conditions. When I asked those in the familiarization study what was the most important element of the training to them, the almost unanimous choice was "music playing as we work".

Communication and Language

Language was one of the most important considerations because the data collection method was the face-to-face qualitative interview. Here questions needed to be asked covering the many elements of language. There was language in terms of vocabulary – what range from restricted to elaborate language did young people share amongst themselves? There was language in terms of semantics – did the young respondents operate a definitional language where the word denoted a fairly precise meaning or, if they had a more restricted vocabulary, did they use words to 'stand for' a particular class of meaning? A second issue here was that of swearing as either adjectives or for emphasis – did respondents use terms like 'f*cking' as part of their natural lexicon?

There was no doubt that trainees belonged to a common speech community with its distinct dialect and mutual intelligibility. This speech community was determined by age, gender and status (i.e. the low achiever labelling). In other words they were able to converse fluently with each other (Sociolinguistics 2005). For the researcher it was like learning a second language as well as developing cultural sensitivity. The big risk and something the trainees (successes and low achievers alike) were sensitive to was being patronised. This meant that they could

somehow tell when things were being dumbed down. They resented this greatly. It was almost impossible though to tell what would qualify as acceptable vocabulary and what was considered to be talking down. The best way was to learn the vocabulary and try to fit everything within the range of words and expressions commonly used.

Semantic variation and vocabulary interacted in a very interesting way and in a way that almost made this very real investment in time and personal comfort worth every minute. An example was the researcher's training partner (we were always paired for safety reasons). We had not been too active so far in the week and Jonesy, my 18 year old low achieving partner, made the comment in a vehement way 'Its f*cking slave labour around this place'. When I replied 'Jonesy, we have hardly struck a bat this week and its Thursday' he said 'That's what I mean, they treat you like dogs around here. Give you the scraps and get on your case when you can't make it good. We're all f*cking fed up with feeling like dogs'. What I deduced from such comments, and there was a variety of them, was that where the trainees did not have the exact word to express something, then a word that was patently negative (or positive) was used in its stead. The expectation was that examples would be asked for and provided so that the contextual clues would be added to the words. Looking ahead, text analysis was not going to fit this study.

The last item in the example of aspects that would benefit from a familiarization study may not be as important to some researchers as others. It all depends on which speech community[1] the researcher belongs to and it probably becomes more of an issue when some elements of the research context are not comfortable for the researcher. In the YTS study, swearing came into this category. In the informal atmosphere of the workshop slang was widely used and the constant use of 'f*cking' was no doubt a meaningless part of the trainees' speech style. It was certainly pervasive, graphic and expected to be part of every conversation. When trainers and tradespersons were present it was not so pronounced but when talking about work with each other it was expected. The dilemma was in deciding on the patterns of speech and tones of

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[1] A speech community is a group of people who speak a common dialect. Linguists working on language variation often characterize speech communities in terms of extra-linguistic factors, i.e. along social class, ethnic or geographical lines (Sociolinguistics 2005). At the time, the researcher was most concerned with how she should interpret the language of an alien organizational community (i.e. YTS trainees) which defined identities and relationships.

voice which would make trainees most comfortable (and by extension it was hoped more talkative). The researcher determined that experience from this study would not translate in terms of advice to other studies she might conduct. The balance between the researcher's comfort (and with discomfort comes artificiality) and the respondent's natural language was in the YTS study arrived at by constantly replaying and reflecting on the interchanges of the day and the outcomes

CASE 2   Testing Theory

Background

The goal of this research, reported in Whiteley (2002), was to empirically test two theories which appeared to be making very similar assertions. On the one hand there was complex adaptive systems theory (CAS) originating with the physical and natural sciences but being applied increasingly to organizational phenomena in the 1980s and 1990s (Mathews. White & Long, 1999); on the other hand there was ethnomethodology/conversation analysis which Sacks (1984) claimed was a natural observational science. Work on the sociology of scientific knowledge such as Lynch (1993) and on the "construction of life through language" (Shotter 1993a) gave further support to the rationale for the investigation. The field research question may be summarised, for the purpose of this paper, as "Does conversation between people in a group follow the same patterning as a complex adaptive system?"

The Need for Familiarization

Conversation analysis (CA) is a method for the analysis of talk in naturally occurring social interaction. It was pioneered initially by Harvey Sacks and developed by his colleagues Schegloff and Jefferson (Sacks, Schegloff & Jefferson 1974). Today CA is well established as a method of researching organizational discourse (Grant et al. 2004; Putnam & Fairhurst 2001). Familiarization with the exacting requirements for data collection using CA, which are well documented, was the straightforward assimilation of the practical conditions to ensure quality. Achieving the rigorous, systematic procedures demanded an extensive familiarization study in which a range of procedures were tested.

The Cases

In contrast to Case 1 described above where familiarization took place on a single site, setting up the main studies in Case 2 required a series of familiarization studies. Learning was iterative – that is experience from each familiarization event fed in to the next event in a process aimed at achieving the theoretical rigour demanded by CA at the time.

A summary of these familiarization events follows and the lessons learnt are described under the heading *Procedures* below.

Familiarization Events

The main study was to be carried out in two different research environments.

The first was 'natural' in that participants conducted their discussions according to their own agenda on a training course and tape recording was unobtrusive and apparently ignored. Familiarization for these sessions took place several weeks in advance and were not written into the research report (dissertation). Meetings were recorded and transcriptions attempted. For the main study gaining the trust of the participants was essential. The researcher mixed and socialised with them over a period of two days and only placed the tape recorder in the meetings after he was invited to do so. That the participants were far too busy with their affairs to bother about the microphone was evidenced by the transcripts.

The second part of the main study was carried out in a Group Support Systems (GSS) laboratory where a visual prompt can be projected and all participants had a computer keyboard in front of them. The term 'Group Support Systems' (Jessup & Valacich 1993) refers to a technology that supports group work. Typically a facility or laboratory has several laptop computers and these are connected in a local area network (LAN). In this case, a software called MeetingWorks™ was installed in the laboratory as a structured and systematic meeting procedure. Participants key in their own comments in parallel and when they are in discussion mode a facilitator captures the written comments for viewing (and altering if necessary) on a public screen. The screen can be used, as it was in this case, to explain a scenario and display a visual prompt.

Its easy to imagine that all you have to do is recruit appropriate participants, invite then to the GSS laboratory, run the procedures and then you have your data. After all, isn't that what a GSS laboratory is all about? In practice it took three pilot studies over a five week period before the researcher was prepared to go ahead with the main study. And then, of the six GSS sessions in the main study, two produced data which did not meet the requirements of rigour.

Detailed notes and analysis followed each GSS pilot study. Here is an extract, taken from the *Audit Trail* (Whiteley, 2002) which sums up the experience gained from the three pilot familiarization studies

Overall Conclusions

At this stage the three Preliminaries sessions have given a very clear indication of the practical steps to be taken to move closer to the ideal of simulating a 'natural' conversation session in the research environment. These are:

1. To ensure a setting in which natural conversation can develop between members and the impact of the technology is minimal
2. To ensure that the prompt (a visual scenario) introduces the subject as naturally and neutrally as possible
3. To ensure that the Conductor (who runs the session) achieves minimal direction while controlling the procedures.

When the team can achieve a flow for each session which encourages natural conversation, the main (City) study can be mounted.

These three Preliminaries, and especially the third Preliminary, which compares interaction within a small group with interaction in an institutional setting, have brought to light a fundamental misunderstanding which is buried in the original Candidacy Proposal and in subsequent preparatory work for the theoretical contribution towards the final thesis.

Before these Preliminaries were carried out, it was assumed that GSS computer programmes, such as MeetingWorks™ or Grouputer (Zing) as they stand would be appropriate for the electronic capture of individual data at the start and the close of each research session.

Even before the Preliminary sessions, in training sessions for the Zing computer programme, (Zing Technologies & Grouputer 1991-2001), it became apparent to the researcher that the templates already on Zing and similar software were unsuitable for the research planned as they impose a predetermined structure onto the session. Awareness of this led to the adoption of Zing software (rather than MeetingWorks™) which had the ability to adapt to the planned research procedure.

The importance of retaining a research environment as close as possible to 'pure CA' was brought home to the researcher by the analysis of Preliminary 3. GSS software has been developed for meetings which are very different in terms of the collection of data by CA. As both the researcher and other members of the team have themselves been immersed professionally in the GSS culture, a

conscious and very determined effort needed to be made to differentiate this research from the normal GSS procedures.

Superficially it may look the same as the same hardware is used and apparently the same software. But this research is totally different in the following respects:

1. No standard template is used; there is only a research procedure.
2. The environment must be natural and conducive to conversation between all members.
3. The computer is used for individual data collection only –at the start and close of the research session.
4. The primary data is collected through the tape recordings of the conversation session.
5. There are no 'discuss', 'organise' or 'brainstorm' functions, which are common to GSS, in this research.
6. The Conductor is not a facilitator.
7. There is no predetermined plan for the meeting, apart from the simple procedure of starting the conversation with a visual prompt.
8. The researcher is not looking for meaning in the transcripts – only for a "set of formulated 'rules' or 'principles', which participants are demonstrably oriented to in their natural interactions" (Have 1999).

Finally, the researcher concluded that he will have to carefully review those parts of the thesis in progress which refer to the use of GSS to ensure that the particular method of electronic data capture is fully justified, while being distinct from the standard and well known forms of GSS software usage.

Procedures

Familiarization was almost totally about interview procedures and protocols as depicted in Figure 1 above. This is in sharp contrast to the YTS case study described earlier. Indeed, CA is interested in naturally occurring 'talk-in-interaction'. This generally (but not always) requires the absence of the researcher during data collection which is usually done by tape recording. The researcher was reminded of the dangers of being present when in one early pilot study, there was pause in the conversation. A participant turned round to the researcher, who was a mute observer, and demanded "What do *you want* us to say?"

The procedures, and how they were developed to conform with the protocols of CA and methods of data analysis are described in detail in Whiteley (2000). A summary of five major issues which needed to be faced in the familiarisation (pilot) studies follow.

Tape recording

The study called for the recording of conversations between 4 – 8 people in a group. It soon became apparent that an omni-directional microphone was essential and that its presence had to be unobtrusive. Then there was the technique in transcription of identifying each speaker when the researcher was not present. Recording skill had to be learnt.

Transcription

To transcribe a tape for analysis using CA requires adopting very specialist transcription conventions. This is often cited as a problem for researchers. In the familiarization study a test was made. A ten minute tape was transcribed by a professional copy typist with the hope that this could alleviate the tedium. The result was a shock: the copy typist was inaccurate in places and had a habit of ignoring talk she could not hear or understand. This early experience convinced the researcher that he would have to develop CA transcription skills – which he did.

Focus Groups

At one data collection session, participants voiced their belief that they were at a focus group interview. This highlights a well-documented phenomenon in research today known as "the professional respondent". The researcher responded in two ways. First the guidelines for participants were revised. Then, in writing the thesis, group data collection sessions following CA principles of rigour, were compared with focus groups. The fundamental difference is that focus groups have no theoretical underpinning per se, whilst CA is theory based.

Scenarios

A central part of this research involved group discussion in response to a scenario. In a communications laboratory where every participant had access to a computer, responses to key questions were recorded before and after the discussion. The intention was to record shifts in response as a result of open and unguided discussion. During the pilot study phase several scenarios were tested. The purpose was to choose one which was 'neutral' – in other words factors such as gender, age, class, and vocabulary, which featured so prominently in the YTS study, would not affect the results. It was the structure we were looking for and not the meaning. We believe that by careful development of the scenario during the familiarization studies this was achieved.

Case Study 2 in Retrospect

The practical outcome of this doctoral research is more apparent today than it was at the time. Four of the theorised characteristics of a complex adaptive systems (spontaneity and unpredictability , self-organisation and co-creation) were clearly evident in small group talk-in-interaction. Only emergence was problematic. This finding gave empirical plausibility to the theoretical work of Shotter (1993a, 1993b) and Griffin, Shaw & Stacey (1998).

It seemed clear that conversation analysis had a potential for consumer research which was not then (1999) recognized by the scholarly literature or by market researchers. Furthermore, the conclusions pointed to opportunities for the development of theory and application of discourse research on marketing communications and word-of-mouth advertising.

However, the scholarly study of organizational discourse has, over the last five years, 'taken up the baton and run with it'. The study of discourse in organizations, the use of the language in context, and the meanings or interpretation of discursive practice has become an established discipline. CA is one of eight discourse research typologies reviewed by Putnam and Fairhurst (2001).

> A growing disillusionment with many of the mainstream theories and methodologies that underpin organizational studies has encouraged scholars to seek alternative ways in which to describe, analyze and theorise the increasingly complex processes and practices that constitute 'organization...It is now difficult to open a management organizational journal without finding that it contains some sort of discursive-based study and there have been a recent flurry of books, edited collections and journal special issues devoted to the topic" (Grant et al. 2004).

This case study illustrates the importance of a familiarization study for discourse research and draws attention to some of the procedural hurdles which face the researcher who elects to use conversation analysis.

Concluding Comments

We stated at the outset that we believed the literature on qualitative research needed to recognize that first time researchers, such as those tackling their fieldwork in pursuit of a higher degree faced unique problems. It is not as if the literature ignored the difficulties, such as setting up an interview or deciding on categories for an open-ended questionnaire. Indeed, generalizations and theoretical advice abounds.

In this paper we have adopted the perspective of a student facing fieldwork for the first time. We have stressed that these early days can make or break a research which will be only as good as the preparation which is put into it. We have called this period a 'Familiarization Study".

The paper seeks to establish a scholarly approach which will allow students to understand and classify their experiences. The two case studies illustrate how we, without advice and using our desire to achieve rigour in qualitative research, addressed the period which preceded the data collection main field study.

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