

Karin Klenke

QUALITATIVE RESEARCH IN THE STUDY OF **LEADERSHIP**

SECOND EDITION



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PREFACE

This book, the second edition of “*Qualitative Research in the Study of Leadership*” is about the use of qualitative research methods in the study of leadership. It reflects my transformation as a leadership scholar from a quantitatively trained organizational and behavioral scientist to an eclectic researcher who is comfortable in both qualitative and quantitative paradigms and methodologies. Questions about leadership that address “what” and “when” types of issues such as what are the effects of a coaching intervention on executive health or when a leadership succession plan should be implemented are readily answered by quantitative methods. On the other hand, questions about “why” or “how” of leadership issues such as why do leaders engage in toxic and destructive behaviors or how do certain leadership attributes that were originally an asset turn into a liability cannot be answered by quantitative designs. Crossing the great paradigm divide between the two paradigms for me was an enormous challenge which necessitated unpacking my philosophical assumptions and previous training in quantitative methods and statistics. At the same time, it was a profound and humbling experience that broadened my own research repertoire significantly and allowed me to take a fresh look at the way we study leadership.

It was a journey that was supported by my work as chair of qualitative dissertations and my role on the editorial board of a number of leadership journals, both qualitatively oriented publications such as *Leadership* published by Sage in the United Kingdom and *The Qualitative Report* as well as journals that publish both qualitative and quantitative leadership articles such as the *Journal of Management*, *Religion and Spirituality*, and the *Leadership and Organizational Development Journal*, and as Guest Editor of special issues of journals devoted to specific leadership topics published in, for example, the *Journal of Organizational Analysis* and the *Journal of Management Systems*. My foray and transition into the qualitative domain was facilitated by opportunities to teach doctoral level, both introductory and advanced, qualitative methods courses, lecturing at universities in the United States and abroad, and bringing a qualitative perspective to practicing managers through workshops and seminars.

The content of this book reflects a dual concern for both students of leadership at all stages of scholarship ranging from graduate students to seasoned researchers and practitioners as consumers of qualitative leadership research. For aspiring and

established leadership scholars, I believe it is important to bring a critical ethos to their research and challenge the conventions of leadership research by exploring its existence beyond individual office holders and heroic charismatics (Collinson & Grint, 2005, p. 7). Likewise, I think it is important for practicing leaders to develop a sense and understanding of the complexities of qualitative research which may entail having to suspend previously held assumptions that qualitative research lacks rigor, is largely anecdotal, and is more of an art than a science. Hopefully after reading this book, both leadership scholars and practitioners develop an appreciation of the potential and limitations of qualitative research to answer the many why and how questions surrounding the role of leadership in contemporary organizations, communities, and society at large.

The book is not intended as a how-to-do qualitative research text although some chapters (i.e., on content analysis) are more detailed-oriented and offer more practical instructions than others. For the various methods described here such as qualitative interviewing or ethnography, numerous how-to books are available that take the reader systematically through the research process and describe in detail how a case study or narrative analysis are being conducted. Instead, this book situates qualitative leadership research in the larger context of leadership studies as an academic discipline taking into account the multifaceted nature of leadership as a relational phenomenon, the context-dependent nature of qualitative leadership research, and emerging theoretical and methodological trends.

GENERAL ORGANIZATION OF THE BOOK

Like the first edition (2008), the book is divided into four parts. Part I consists of two chapters which provide the philosophical, theoretical, and methodological foundations undergirding qualitative research. These two chapters trace the evolution of research paradigms and methods over several decades as qualitative leadership research slowly gained legitimacy and credibility. Ten years ago, it was unlikely that major publication outlets for leadership researchers such as the *Journal of Applied Psychology* or the *Academy of Management Journal* accepted qualitative articles for publication; today most quantitatively oriented journals welcome well-designed and rigorously executed qualitative submission. Yet, the hegemony of positivism and the quantitative paradigm lingers and assessment of qualitative studies vis-à-vis quantitative research have not disappeared all together. Those of us who explore the frontiers of knowledge such as the use of images found in film, TV, videos, and works of art as sources of data instead of using textual data in our analyses in our research find that we still must defend both our credibility as leadership scholars and the validity of our data against the traditional canons of science as embraced by

positivism and more orthodox research methods such as surveys and laboratory and field experiments.

Part II describes and evaluates those qualitative methods that have been most frequently utilized in leadership research. Part II (Chapters 3–6) includes four chapters that cover case studies, content analysis, qualitative interviewing, and mixed methods. These methods cover a diversity of approaches ranging from purely qualitative studies such as those found in some multiple case studies discussed in Chapter 4 to quantitatively oriented methods which characterize some mixed methods designs presented in Chapter 6.

Part III examines qualitative methods that I believe hold considerable promise to advance the field of leadership research but have been infrequently utilized for a variety of reasons including time constraints (e.g., a phenomenological or grounded theory study may take several years to complete), costs, concerns about rigor and quality standards that these methods raise in the minds of those who still question the legitimacy of qualitative studies in leadership research and preferences of the gatekeepers (journal reviewers and editors) who do not always favor qualitative research. Part III covers a range of methods including grounded theory and ethnography (Chapter 7), phenomenology and narrative analysis (Chapter 8), and non-text-based approaches that utilize images found in films, TV, photography, dance, works of art including paintings, drawings, and sculpture and other image-based sources of data (Chapter 9).

Finally, Part IV presents two empirical studies that employed content analysis and a mixed methods study that combined content analysis and case study. More specifically, Martin (Chapter 10) content analyzed over 1400 pages of writing of the early 20th century management scholar and political philosopher Mary Parker Follett whose ideas foreshadowed many concepts that are part of the contemporary leadership landscape such as followership, empowerment, shared leadership, complexity theory, and invisible leadership. Not only is this study remarkable because of the size of the database, but it also combines hand and computer assisted coding to trace Mary Parker Follett's thoughts and writings about leaders and leadership, followers and followership through her books, papers, and lectures but the author also discusses the implications of Follett's work on contemporary leadership theory. In a comprehensive set of detailed analyses, Martin was able to synthesize Follett's work and demonstrate that leadership in its many manifestations emerged as a unifying thread in Mary Parker Follett's work, both in theory and practice. Chapter 10 complements Chapter 4 on content analysis and illustrates and brings to life many of the methodological principles and procedures germane to content analysis.

In Chapter 11, Wallace examines a topic which has received none or very little attention in the theoretical or empirical leadership literature. Instead of investigating leadership in political elites, formal organizations, or multinational firms, the author focuses on leadership in at-risk, distressed communities where situational contingencies bear little resemblance to most contexts in which leadership is typically studied. The purpose of this research was to develop a theory of leadership in poverty stricken, at-risk communities by an in-depth study of a single leader who served as an exemplar and developed leaders in these settings for decades. The database in this study consisted of the writing of Myles Horton and interviews with him that were content analyzed. The study provided a unique opportunity to compare the results and convergence of the results derived from two different qualitative methods. The emergent theory of leadership in at-risk communities identified seven foundational constructs, which, taken together, coalesce on small set of higher order values that reflect the needs and contextual realities and followers in at-risk communities. Wallace's research illustrates concepts and analytic techniques used in case study research described in Chapter 3 while at the same time venturing into a topic of global relevance and importance given the efforts that are currently made worldwide to alleviate poverty around the globe. Collectively, these two empirical studies demonstrate that carefully design and rigorously executed qualitative leadership research can add new dimensions and concepts to the extant literature and open multiple windows for future research.

In the Epilogue (Chapter 12), I revisit themes that are woven into the chapters throughout the book such as the lingering paradigm discussions focused on the relative superiority of quantitative methods, the popularity of mixed methods research as a means of enhancing the credibility and legitimacy of qualitative research, and the need for leadership scholars to avail themselves of the less utilized methods and venture beyond text-based sources and creatively engage with image-driven approaches taking advantage of the technology-enhanced ways of studying leadership using works of art, film, photography, and the unlimited opportunities inherent in web-based leadership research.

Each chapter covering the qualitative methods in this book is structured around a number of common elements and conventions. For example, each chapter opens with a representative study illustrating the specific qualitative method discussed in the chapter. Each chapter also describes the major design features, data collection, and analytic procedures germane to the method followed by a review of the defining features of a specific qualitative research method. These studies are summarized in tables with yet a smaller subset of them singled out for a more detailed discussion. Furthermore, these applications are discussed in the broader context of the extant leadership literature as well as the more immediate context in which the study was

conducted. As the research presented in this book spans a time span of over two decades, the sample studies are ordered chronologically from the most recent to the earliest as I was interested in chronicling temporal shifts in terms of the relative importance of topics, the increased popularity of certain methods in response to current events such as 9/11 or Katrina which spurred qualitative research, the emergence of new methods such as visual methodologies, and shifting criteria for evaluating the rigor of qualitative research over time. Where appropriate, each chapter also features the special dynamics governing the interactions between the researcher and the research participants or unique ethical considerations requiring the researcher's attention, as for, example, protection of the anonymity of research participants in e-mail interviews.

Broadly speaking, this book targets students of leadership—whether they are graduate students, established scholars, or practicing managers who want to remain current in cutting edge leadership research. Hence, the book is appropriate for use as a primary text in graduate courses in research methods in leadership studies and related disciplines such as organizational psychology, educational administration, health care management, and public administration to name a few. The book is also appropriate for leadership scholars interested in broadening their research repertoires and venturing into uncharted territory. In addition, the book is likely to be of interest to practitioners in many fields as there is hardly an industry or area of management in the profit or nonprofit sectors that does not address leadership issues and problems. Throughout history, the fate of civilizations and millions of individuals have depended on the quality of leadership of a nation, community, or organization. Today, managers from all walks of life want to know if leadership matters or makes a difference. Qualitative research, along with its quantitative cousin, provides some answers to these quintessential questions. As the world in which leaders and managers operate is becoming more complex and difficult compared to the past, continually shaping and renewing itself through forces such as globalization, rapidly changing technologies, changing workforce dynamics, and changing conceptualizations of leadership, qualitative research has much to offer. This book presents a tapestry of qualitative methods with warp and weft threads waiting for students of leadership weave their own distinctive fabrics using the methods described in this book to advance the study of leadership and breathe some fresh air into a discipline at the cusp of a paradigm shift.

COMMENTS OF THE SECOND EDITION

In preparing the second edition of *Qualitative Research in the Study of Leadership*, I focused on three areas: (1) updating of references including the studies cited; (2)

deletions; and (3) incorporation developments in leadership research that have moved to the forefront of the first edition published in 2008.

The updates found in the 2nd edition include more than 50% new empirical studies summarized in the chapter tables and subsequent review of these empirical studies in the respective chapters. All opening vignettes for each chapter are new. With very few exceptions, I replaced all empirical studies conducted in the 1990s with more recent ones. However, at the same time, I continued to give credit to leadership scholars who were instrumental in shaping the discipline such as House (1977; Bass, 1985), Fiedler (1967) for the development of charismatic, transformational, and contingency theory, respectively, that have been staples in leadership research for decades thereby creating a fabric of continuity/discontinuity. I also retained my position on the importance of context, not only the context in which data are collected, the broader socioeconomic context including time and place, but also the importance of contextualizing qualitative research methods.

Unfortunately, I had to delete the chapter on narrative analysis in Part III written by Dr. Frank Markow as an underutilized method because the author was unable to revise the chapter in a timely manner due to a death in his family. Among other deletions is the section on historiometry in Chapter 7. On closer examination, it turned out that this method was misclassified in the 1st edition as qualitative when, in fact, it is clearly a quantitative method. In recent study, Friedrich et al. (2014) examined the collectivistic nature of leadership as opposed to being an individual level phenomenon. The data, derived from historical biographies of Brigadier General George C. Marshall, were analyzed using intercorrelations, hierarchical regression, and path analysis. It is always a humbling experience discovering one's mistakes in previous writings. Within chapters, all references that I considered obsolete were also deleted.

Although, in my opinion, there have been few radical changes in research methods, both paradigmatically or procedurally, there are some interesting extensions of developments that, in some cases, go back for decades. For example, computers have been used in research for over 30 years but current applications of technologies such as the use of e-mail in, for example, computer-assisted telephone interviewing or Internet sites as sources of data offer new avenues for leadership researchers. The Internet is now used in the recruitment of research participants, data collection, data storage, and retrieval. Some believe that the Internet may revolutionize some disciplines while others remain skeptical of its applicability.

Software programs used in the analysis of qualitative data such as Atlas.ti and NVivo simplify coding by facilitating the labor-intensive phases of coding and early

phases of category development. However, in the final analysis, it is the human researcher who is responsible for the analyses, not a computer program. Fourth generation software programs such as Qualrus offer further enhancement that can be incorporated by the human analyst. Another development offered by technology is the use of image-based data derived from photographs, videos, TV, documentaries, and works of art. A wide range of data collection and analytical procedures are now available for the leadership researcher venturing into the domain of visual methodologies.

These technological developments challenge methodological tradition as well as current practices in training qualitative leadership researchers.

I acknowledge my gratitude to my PhD students, past and present, in helping me fine tuning my qualitative research skills. I wish to thank my clients of the Leadership Development Institute (LDI) International for constantly reminding me that without consideration of the practical implications and application of leadership theories and research methods, the study of leadership remains stale and without a soul. My thanks also go to Lyn Uhl and her staff at Emerald for her guidance and input that brought this project to fruition. I thank my husband Will for his insights based on the extraordinary leadership challenges he experienced, and the profundity of this thoughts as well as the rest of my family for their support and tolerance of my prolonged absences which allowed me to complete the second edition without feeling guilty. And finally, my gratitude is expressed to the many leadership scholars whose work provided inspiration, reinforcement, and directions for my own leadership journey.

Karin Klenke
Richmond, Virginia, USA, June 2015

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PART I
FOUNDATIONS OF QUALITATIVE
RESEARCH

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1

PHILOSOPHICAL FOUNDATIONS: QUALITATIVE RESEARCH AS PARADIGM

INTRODUCTION

Leadership Research: Past Traditions and Current Trends

Historically, leadership research has been grounded in the objectivist, positivist, and quantitative paradigm since the inception of leadership studies as a field of scholarly inquiry. Both the work of Sir Francis Galton conducted in the study of individual differences more than 100 years ago and the emergence of social psychology, particularly the study of small group behavior more than 80 years ago, are often viewed as the beginnings of leadership studies. Leadership as a topic and as an academic discipline has received attention in thousands of empirical studies, theoretical work, books, and popular press articles, yet it can be argued that we still do not understand leadership particularly well. Burns (1978) concurred when he stated that we know too much about leaders as persons and far too little about leadership as a process.

In this chapter, coupled with Chapter 2, I provide the theoretical and methodological foundations of qualitative research both as a paradigm and a research method. The chapter begins with a definition of qualitative research followed by discussion of the essential components of a paradigm and a review of the major paradigms relevant to the study of leadership and sets the stage for the method chapter that follows.

During the history of the discipline, research has relied heavily, at times almost exclusively, on the traditional social science repertoire of quantitative methodologies

such as surveys, lab, and field experiments to help us identify and understand leadership problems and develop solutions that can be scientifically tested, verified, and replicated. According to [Cohen and Maldonado \(2007\)](#), positivism holds that society, like the physical world, operates according to general laws. Some of the hallmarks of positivism are the assumption that there is a valid, verifiable truth, that science is cumulative and causal determinism, prediction, and the generalization of results are necessary requisites to validate these assumptions. Positivism ruled along with the assumption that knowledge can be conventionally summarized in the form of time- and context-free generalizations.

The interest in qualitative research has been fostered by a general dissatisfaction with the type of information provided by quantitative techniques ([Weber, 2004](#)). This dissatisfaction stems from several sources: the complexity of multivariate research methods, the distribution restrictions inherent in the use of these methods (e.g., multivariate normality), the large sample sizes these methods require, and the difficulty understanding and interpreting the results of studies in which complex quantitative methods are applied ([Cepeda & Martin, 2005](#), p. 851). Although quantitative methods are ideal for testing hypotheses, especially with large samples, permitting the development of sophisticated causal models and allowing for replicability across settings, they are poorly suited to help us understand the meanings leaders and followers ascribe to significant events in their lives and the success or failure of their organizations. As a result, until fairly recently, qualitative studies in leadership remained relatively rare (at least as measured by published journal articles), especially within North America. Instead, the paradigm that still guides leadership research is the quantitative model heavily subscribing to survey and questionnaire research as the dominant data collection method.

However, quantitatively generated leadership descriptors often fail to lead to an understanding of the deeper structures of the phenomena we study. Several authors (e.g., [Steiner, 2002](#)) argue that qualitative studies must play a more pivotal role in management and leadership research. The study of leadership is particularly well suited for qualitative analyses because of multidisciplinary nature of the field which has to be more open about paradigmatic assumptions, methodological preferences, and ideological commitments than many single disciplines. Moreover, the study of leadership is context-dependent. Stripping qualitative research (and leadership) of its context, according to [Guba and Lincoln \(1994\)](#), through appropriate controls or randomization may increase the theoretical rigor of a study but detracts from its relevance because their outcomes can be properly applied only to other similarly truncated or contextually stripped situations (e.g., another laboratory). Qualitative data, the authors argued, can redress the imbalance by providing contextual information (p. 106).

Despite the talk of a paradigm shift away from logical positivism, with its emphasis on reification of verifiable data, utilization of reductionist research methods, and postulation of a priori hypotheses that can be subjected to statistical analyses, qualitative leadership research is only increasing at a slow rate. After decades of paradigm wars, the hegemony of the quantitative paradigm continues to have a strong hold on leadership research. Yet, it is widely recognized that rigid adherence to the dominant paradigm leads us to become prisoners of that paradigm and can result in dysfunctional consequences.

Qualitative leadership studies, when conducted with the same degree of rigor and concern for validity and quality, have several distinct advantages over quantitative approaches by offering more opportunities to explore leadership phenomena in significant depth, to do so longitudinally, and answer “why” types of questions about leadership as opposed to “how” and “what” types of questions answered by quantitative research. Moreover, according to Steiner (2002), qualitative research has the potential to restore respect for ontological integrity and the capacity to replace esoterica with relevance.

The upward trend in qualitative research began after the *Administrative Science Quarterly* (ASQ) published a widely cited and influential special issue in 1979. In this special issue, the editor, Van Maanen argued compellingly for the unrealized value of qualitative research and called on organizational scientists to utilize more qualitative techniques. This special issue of the ASQ was instrumental in facilitating the legitimacy of qualitative research and encouraged researchers to reconsider unflattering views of qualitative research. In the years following that influential call, organizational researchers, including leadership scholars, have responded favorable to Van Maanen’s (1979a, 1979b) arguments.

Since the publication of the ASQ special issue, qualitative research has experienced a boost in several leadership-related disciplines such as political science and sociology. Speaking for the field of leadership studies, Lowe and Gardner (2000) content analyzed the articles published in *LQ* from 1990 to 1999. The authors reported that qualitative studies, which made up 40 articles published during the nine-year period, were used with roughly half the frequency of quantitative studies with 78 quantitative articles published during the same period. Between 1980 and the time of this writing, there has been a renewed interest in qualitative research readily indexed by the publication of numerous textbooks on qualitative methods (Day, 2014; Flick, 2009; Gummesson, 2006; Silverman, 2011), special journal issues on qualitative methods (e.g., *Management Decisions*, 2005(2)), review articles (e.g., Bryman, 2004), journal articles and increased number of presentations on qualitative research at national and international conferences. For example, journals traditionally known