Chapter 18

Using Qualitative Methodology to Study the Dynamics of Organizational Change

by Karen Golden-Biddle, Elden Wiebe and Karen Locke

Abstract

This chapter argues that methodology is an important reason why studies on organizational change fail to incorporate dynamics. In conducting cross-sectional, a-contextual studies, researchers do not access changes as they are occurring. Consequently, as a field we have overlooked flux and movement, and the ambiguities of change. Although very time-consuming, some emerging research is adopting a longitudinal, contextual approach, with researchers drawing on qualitative methodologies as they go into organizations and observe change in real time. Our purpose in this chapter is to take a closer look at a few of these studies to unpack their diverse methodological approaches to studying change dynamics. We develop three methodological pathways, each associated with particular investigative and analytic practices. These pathways should be construed as an early attempt to gain a more sophisticated understanding of our methodologies for incorporating dynamics into our studies of organizational change.

Introduction

Investigations of organizational change in management and organizational studies have privileged a cross-sectional, a-contextual perspective (Pettigrew, Woodman & Cameron, 2001). Assuming stability and defining change as what happens between stable periods in more or less prescribed ways, this perspective has hampered our understanding of the dynamics in changing (Chia & Langley, 2004; Tsoukas & Chia, 2002). Conceiving change as absolute states, or fixed and timeless entities, studies have overlooked change as longitudinal and situated phenomena.

One important reason for this oversight of dynamics is methodological in origin: only recently have researchers adopted longitudinal, qualitative methodology to study change (Avital, 2000; Wiebe, 2005). Going into organizations over time and observing change as it is occurring, emerging research is beginning to discern and depict dynamics of organizational change that are multivocal and non-linear in nature. In comparison with prior work, these studies switch vantage point, from an external cross-sectional perspective to an internal, longitudinal and "real time" perspective. As a result, they are positioned to illuminate the dynamics of change that are part of the "flow" of the "flowing soup" that characterizes everyday life (Weick, 1995) in organizations. Even those structures usually considered stable, such as routines and resources, are construed as potentially mutable (Feldman, 2004; Feldman & Pentland, 2003).

Our purpose in writing this chapter is to take a closer look at a few of these recent studies in order to "unpack" their qualitative methodological approach to investigating change dynamics. We have chosen three to analyze in greater depth because they represent different qualitative approaches: Denis, Lamothe and Langley (2001, *Academy of Management Journal*); Feldman (2004, *Organization Science*), and LaBianca, Gray and Brass (2000, *Organization Science*). By examining these studies, we hope to provide some guidance on how one could illuminate and profitably investigate the dynamics of organizational change. Specifically, we will describe three different methodological pathways, each associated with particular investigative and analytic qualitative practices, and each represented by one of the three studies. We then discuss their methodological implications for advancing the study of organizational change dynamics.

Qualitative research approaches to the study of change dynamics

Qualitative research approaches have long been used in the field of management and organizational studies. Currently, exemplars of such research abound, with some winning "Best Paper" awards from *Administrative Science Quarterly* (c.f. Barker, 1993; Henderson & Clark, 1990) and the *Academy of Management Journal* (c.f. Dutton & Dukerich, 1991; Gersick, 1988; Isabella, 1990). This methodology enables researchers to conduct studies in natural settings over time, and provides the opportunity for studies to access and advance our understanding of how "real life" organizational change occurs in work settings over time.

The term, "qualitative research methodology," encompasses a broad umbrella of various research traditions and investigative and analytic practices (Denzin & Lincoln, 1994; Locke, 2001; Locke & Golden-Biddle, 2002). Research is usually designated as qualitative when the following conditions are present (Locke & Golden-Biddle, 2002): First, qualitative research takes place in natural settings

where researchers typically focus their attention on ordinary situations and events. Researchers usually are present in the social situation they are studying. This is achieved through various data gathering techniques including observation, structured and semi-structured interviewing, text and document gathering from the setting studied, and audio or video records procurement. To the extent that such techniques allow researchers to access life at work as it naturally occurs, it provides a significant handle on "real life" in workplaces (Miles & Huberman, 1994). Second, qualitative research draws on verbal, rather than numerical, language as indicators of the phenomenon of interest. These verbal language texts include field notes, interview transcripts, diaries, conversation records, and organizational documents. And, finally, the results of qualitative analyses are communicated in a textual form that verbally re-presents the empirical world studied.

Different methodological approaches

Within this general description of qualitative research, there are varieties in approach that reflect researchers' orientations to particular disciplinary traditions, or research communities. Some approaches that have found favor in the study of work organizations are action research, case studies, ethnography, narrative analysis, grounded theory, and discourse analysis. In each of these approaches, the research takes a slightly different shape and is pursued to achieve slightly different outcomes. Here, we draw on three of them (action research, case study and ethnography) to develop different methodological pathways for the study of change dynamics, each associated with particular investigative and analytic qualitative practices, and each represented by one of the studies identified above.

Methodological pathway #1: Action research

The use of action research to study organizational change most broadly draws from Kurt Lewin's (1951) field theory and early conceptualization of planned organizational change. Lewin's scholarly efforts and interest in planned change derived from his own commitment to improve intractable social problems of the day, such as racism. Accordingly, he argued that combining intervention with knowledge creation was methodologically sound, insisting that the best way to understand a social system was to first introduce change into it and then observe its effects. During this same post-second world war period, a group of scholars in the United Kingdom similarly pursued research directed towards social transformation and formed the Tavistock Institute for Human Relations (Elden & Chisolm, 1993). Following from this tradition, action researchers distinguish themselves through their dual purposes of providing practical advice to assist practitioners with specific issues and change initiatives while advancing knowledge about the dynamics of change.

Action research is generally conceived as an iterative and multi-phased inquiry process, beginning with data gathering and problem diagnosis, continuing with planning and designing an intervention informed by theorizing about organizational functioning, implementing the intervention, and ending with a period of evaluation. This, in turn, leads to another cycle of problem diagnosis, and so on (Elden & Chisolm, 1993). Researchers are change agents who participate in the research settings as well as creators of knowledge about the change process. Organization members are active participants to the research process, rather than passive "subjects". Their participation is especially evident in a form of action research known as "co-operative inquiry" (Bradbury & Mainemelis, 2001; Reason, 1988; Reason & Rowan, 1981) involving members as full partners in the change and learning process.

Action research example

In "A Grounded Model of Organizational Schema Change During Empowerment", Labianca, Gray and Brass (2000) present their analyses of a 2-year organizational development project (2000:235) "involving redesign of a health care organization's structure, team building, and increased participation of lower-level employees in decision making". They indicate that they wanted to understand how those involved, including employees and managers, experienced the change initiative. In particular, they wanted to understand employee resistance to this effort that emerged during its implementation.

To conduct the study, the authors adopted a hybrid approach to the research design involving both action research and ethnography. The first author participated as ethnographer, collecting data over the course of the project in the form of semi and un-structured interviews and observations of meetings. The other two authors participated as consultants on the OD intervention (paid by management), collecting data in the form of semi-structured interviews, questionnaires, and archival data. As well, they facilitated and kept records of teambuilding efforts. As part of the OD effort, they conducted an initial diagnosis and feedback, which received employee confirmation of its trustworthiness in representing their experiences. Then, two change initiatives were introduced: cross-departmental team building efforts, and the DARE committee (Design and Reorganization Effort), a "pivotal" committee charged with recommending a new organizational structure. At the end of the reorganization, two sets of follow up questionnaires were implemented, those created by the authors and by the employees themselves.

Intrigued with employee resistance to change that had emerged during this intervention effort, Labianca et al. (2000) conducted a preliminary analysis that showed motivation of resistance motivated by cognitive rather than political or self-interest barriers. Drawing on schema theory and change theories of

Lewin (1951) and Schein (1988), they conducted a study that resulted in an inductively generated model of change in employee and management decision making schema that could be used to understand empowerment intervention initiatives. They identified four phases: (1) initial situation representing stability and old decision making schema; (2) motivation to change as indicated by management proclamation and environmental concerns; (3) new schema generation, iterative schema comparison through implementation of the intervention, evaluation and reinforcement of old or new schema; (4) and stabilization in either new or old schema.

Similar to action researchers in general, these authors also sought to achieve two purposes: providing practical advice in situ concerning resistance in empowerment change initiatives, and advancing knowledge about the cognitive barriers – and more generally the dynamics of changing in organizations. As Labianca et al. (2000) indicate, their focused model of change for decision making schema adds to theoretical understanding of change by pointing out the importance of a testing period in which the old and new schemas can be compared with action. In addition, in contributing to practice, they develop a large list of implications (2001:253) that can be used for improving change initiatives, in particular for the "design and conduct of empowerment efforts in organizations". Most generally, they recommend that management needs to realize that multiple schemas – old and new – will co-exist throughout the change process, and consequently, efforts should be directed to reinforcing the new schema and developing mechanisms that support the new schema in action.

Methodological pathway #2: Case study

The case study approach is the least circumscribed of the qualitative research approaches, a point underscored by a number of scholars in qualitative research. Ragin (1992) suggests that although "case study" is an integral part of the scientific vernacular, it is nevertheless ambiguously defined: sometimes it is the unit of investigation and other times the research outcome. Similarly, Wolcott (1992:36) remarked that the case approach seemed to "fit everywhere in general and, yet no where in particular".

Stake provides a helpful way through this ambiguity in defining case study as "a choice of object to be studied" (1994:236). For example, in medicine where case studies are common, the case or object to be studied is the individual patient. In organizational studies, the object is more usually one of the following: a single or several industries or organizations; an organizational subunit; or a particular organizational practice such as selection. Based on the object to be studied, Stake (1995) distinguishes three types of case studies: intrinsic, instrumental and collective. In conducting intrinsic case studies,

researchers focus on understanding and describing the uniqueness of a particular case. In instrumental case studies, they are concerned with gaining insight into substantive issues and with refining and advancing theory. And, in collective case studies, researchers draw on the power of multiple cases to develop more general theory. Yin's (1984) approach to case study design favors collective case study, and he offers an approach organized around the replication logic consistent with the experimental method. Regardless of the type of case study pursued, researchers who develop case studies do not particularly favor one data collection method over another. It is not unusual, for example, for data to be collected via observation, structured or semi-structured interview, and through various instruments so that the data set comprises a mix of verbal and numeric information.

Case study example

In "The Dynamics of Collective Leadership and Strategic Change in Pluralistic Organizations" (2001), Jean-Louis Denis, Lise Lamothe and Ann Langley describe their study as contributing to an "emerging process theory of leadership and strategic change in pluralistic settings" (833). In particular, they examined how leaders can achieve deliberate strategic change in pluralistic organizations that are typified by shared leadership roles, divergent objectives and diffused power.

The co-authors developed a collective case study, described (2001:813) "as a multiple case study design with embedded units of analysis and two levels of replication (Yin, 1984), each contributing to the generalizability of the emerging theory". Each case constituted a situation of change that emerged over time in health care organizations in one Canadian province (Quebec), and which required leadership to respond to new external pressures. They drew on a total of five cases: at three hospitals the situation of change was first order in nature, involving the alteration of internal practices and mission redefinition, whereas at two other hospitals the change situation was second order in nature, involving mergers. While cases were similar in representing the potential for change initiatives to destabilize internal patterns of influence and interests, they differed in terms of the intensity of change across them. Congruent with the general case study approach, Denis et al. relied on a variety of data sources to develop their comparative case design: documents (minutes of top-level meetings, press reports, internal documents), interviews (more than 100 interviews across the cases, each between 1–2 hours long) and meeting observations (primarily in two merger cases and including both public board meetings and top-level internal meetings).

Drawing on temporal bracketing analyses (Langley, 1999) of the data, they inductively discerned temporal phases in the various initiatives that showed how change proceeded in different ways in different contexts. In Suburban Hospital, change proceeded in three phases of confrontation, mobilization, and

implementation. At Community Hospital change also proceeded in three phases, but this time as transition, turnaround, and confrontation. At University Hospital, change proceeded in two phases: assimilation and identity crisis. By making comparisons within and across phases among the three cases of first order change, the authors make several general observations about the facilitative contexts and character of change: change takes place in a context of united leadership; constellations of united leadership are fragile, and change is cyclical. The cyclicality of change points to the seesaw nature of attention to organizational issues at one time and environmental issues at another. These forces are often opposing, and are only reconciled in a sequential rather than simultaneous way. This contributes to change proceeding in "fits and starts" (2001:825).

Analyzing data associated with the remaining two cases of second order change, Denis et al. (2001) observe yet other change paths. Metropolitan merger proceeded in four phases: forcing a merger agreement; drifting and divergence; conflict, paralysis and return to protocol; and finally promoting development. Capital merger also had four phases, though different: constrained collaboration, building regional vision, setback from outside pressures, and attack from the environment. In these cases, the authors observed even more tenuous and momentary links across the leadership constellation, fragility of the constellation, and the cyclicality of change. Stabilizing change such that it would be irreversible, while difficult in first order change cases, was virtually impossible in the second order change cases.

In developing the collective case study, then, Denis et al. (2001) considered the phenomenon of strategic change and leadership and drew on data from each case to illuminate it. What case studies miss in detailed nuances of each change situation, they gain in access to comparison across the multiple change situations. Consequently, their collective case study yields a rich process model of strategic change, showing how leadership team dynamics, so necessary for change, are nevertheless a fragile endeavor requiring continuous negotiation of three levels of coupling: strategic (among leadership team members); organizational (between leadership team and internal constituencies); and environmental (between leadership team and external pressures). Although strategic change is feasible, as complexity and pluralism increase and slack resources become scarcer, conditions to protect change initiatives long enough for them to become irreversible are difficult to establish.

Methodological pathway #3: Ethnography

Ethnography originated in anthropology's concern with learning about groups of people – usually in distant lands. It was also a core investigative approach in sociology, achieving full expression in the Chicago School's observational studies of city life, underdog occupations and social deviance.

Informed by cultural theory, ethnographic researchers focus on the detailed examination of social phenomena in a small number of settings; typically ethnography is carried out in just one social setting. They are committed to "living" with and taking part in its life on a daily basis in order to attend to its mundane and routine habits of mind and behavior (Fetterman, 1998). Van Maanen (1998) speaks of researchers' time commitment in terms of a need for them to be present for an annual cycle within the social system studied (compare Zaheer, Albert & Zaheer, 1999) and to have spent sufficient time there to learn how to conduct themselves according to the norms of the setting. Not surprisingly, participant observation and unstructured interviewing are the primary data gathering practices; however, ethnographers also collect and examine relevant documents.

In terms of research process, ethnography is typically described as having a "funnel" structure (Hammersley & Atkinson, 1983). Researchers begin data collection with the orientation provided by a broad theoretical perspective on social system such as culture, but without a predetermined set of analytic constructs, and their focus narrows as the study unfolds. Because of this structure, concepts are more likely to be derived from researchers' experience in the field (Wolcott, 1992). The outcome of these experiences in the field is ethnography as research product (Agar, 1980; Hammersley & Atkinson, 1983) – that is, a culturally focused description and interpretation that derives from researchers' experience, inquiry and examinations in the field setting.

Ethnography example

In "Resources in Emerging Structures and Processes of Change" Feldman (2004) describes the study's contribution as understanding the role of resources in change, in particular conceiving resources (295) "as mutable sources of energy rather than as stable things that are independent of context" and analyzing "the reciprocal relationship between actions and resources as they change". Her analyses show how changes in hiring and training routines created different kinds of resources (authority, trust, networks, etc.) that enabled the staff to enact different schemas for dealing with a difficult situation (e.g. bulimia).

In developing this article, Feldman (2004) drew on data collected as part of a larger, 4-year ethnographic study of changes in work processes in a university residential housing service. Studying one social setting enabled extensive data collection in this system, including 1750 hours of observation, participation and conversations on site during those years. She also assembled 10,000 email messages since, during the fieldwork period, email had become a common form of communication. As well, she sought to understand as much about the life and work practices of members in this organization in her data collection and preliminary and informal data analyses efforts.

Drawing on structuration theory, Feldman (2004) demonstrated that as schemas are enacted, resources are affected, becoming mutable in use. In turn the change in resources affects whether schemas can be enacted with those resources. Over time, these small changes accumulate to perceptible emergent changes in organizational structure. In other words, incremental change occurs as changes in schemas, resources or actions affect change in the other two. Consequently, this study illuminates an important organizing dynamic that constitutes continuous and emergent change in the organization.

More generally, this study contributes to the understanding of organizational change by showing how incremental change can occur as result of endogenous organizational processes, if resources and schemas are defined contextually and understood to be fluid rather than static. It also points out that when change is initiated, more change will emerge than either anticipated or wanted. Managers are neither able to see fully nor to specify completely what a change initiative will entail. Finally, the research also demonstrates the dynamic nature of resistance to change, which can develop at various times in the change process as resources, changed in the process of change, are no longer available for schema enactment.

Some reflections on investigating change dynamics

This chapter has taken a closer look at three studies that access and depict the dynamics of change. Our working assumption in writing this chapter is that when we enhance our understanding of how qualitative methods have been used in our field to study organizational change, we will be better equipped to make choices regarding which research approaches to pursue, and how best to conduct a study that incorporates dynamics. Consequently, we close by drawing attention to the similarities and differences across the three studies in terms of the light they shed on investigating change dynamics.

From a methodological standpoint, adopting a longitudinal, qualitative approach to the study of change begins to open up what actually happens as people experience and enact change. At a fundamental level, all three methodological pathways *enable researchers to be present for the changes as those changes were occurring*. This ability to be present for change as it unfolds allows qualitative researchers to collect data that depicts the flux and movement associated with change, and to draw attention to the active in-process engagement on the part of organizational actors.

Being present for change also provokes and challenges static and linear conceptions of organizational change: there is a face off between prevailing theorizing of change and researchers' experiencing of organizational change. For exam-

ple, the profiled studies show that resistance to change is neither as static nor as straightforward as a simple binary opposition to, or readiness for, change. Labianca et al.'s (2000) action research study, for example, demonstrates that resistance to a change initiative may come late in the intervention as new and old schemas are compared to ongoing actions. Consequently, it highlights how management actions, rather than employee obstinacy, may be the cause of some employees' resistance to change. New schemas must be supported by commensurate actions. Feldman's (2004) ethnographic study also demonstrates that employee support for change can incrementally develop into resistance to change over time, as resources for enacting schemas are no longer available. Finally, Denis et al's (2001) collective case study shows that opposition to change can arise from competing demands from other members of the strategic team, the organization, and the environment. As leadership teams take action to create a "harmonious and complementary constellation" (2001:811), the effect of those actions is weighed by constituencies, and the legitimacy of the leadership team is subsequently evaluated. As Denis et al. (2001) found, "a legitimate and harmonious leadership constellation capable of achieving substantive change" (2001:832) is very difficult to achieve. Thus, all three studies demonstrate that by enabling researchers to be present in change, longitudinal, qualitative approaches offer the potential to facilitate a new theoretical line of sight that illuminates the rich dynamics of how changing actually occurs in context.

In addition to enabling the researcher to be present for the change, each different methodological approach enables the researcher to be *differently* present for change. Being present as consulting change agents in one organization enabled Labianca et al. (2000) to be especially attuned to the cognitive complexities associated with employee resistance. In contrast, being present for change in five different organizations enabled Denis et al. (2001) to draw on broad comparisons to notice and develop the significance of collective leadership and not just individual leadership in enacting strategic change. Finally, being present as one researcher in one organization enabled Feldman (2004) to become intimately familiar with everyday life, and tap into the subtle micro-processes of change as they occurred in unexpected places, namely organizational routines. Thus, in addition to *being present*, each qualitative methodological approach enables researchers to *be differently present* and thus pay attention to different facets of change dynamics.

Table 1. Qualitative research pathways to studying organizational change dynamics

	ACTION RESEARCH Labianca, Gray & Brass, 2000	CASE STUDY Denis, Lamothe & Langley, 2001	ETHNOGRAPHY Feldman, 2004
View of change process	Four progressive phases, but encounter difficulties while in progress that need to be navigated. Evidenced in this study as cognitive barriers to empowerment – co-existence of old and new change schemata.	Proceeds in fits and starts; unpredictable. Succession of inductively defined episodes through which leadership promotes change, but themselves produce a different future since legitimacy continuously being evaluated.	Emergent. Incremental change occurs as actions, schemas, or resources change. Altering one can bring about change in all. Over time, gradual changes accumulate, eventually perceived as emergence of something new.
Research focus	Organizational development project in 1 health care organization that involved structure redesign and shift to preventive care delivery.	Inter-organization level. Changes (1st and 2nd order) in 5 hospitals in one Canadian province.	The routine habits of thinking and behaving that characterize a particular setting.
Data collection procedures	Action research part of study: semi-structured interviews, archival data, questionnaires. Also facilitated and kept records of teambuilding efforts over period of 2 years.	Documents, semi-structured interviews and meeting observations over a period of 8 years.	Unstructured interviews, observation, participation and conversations over 4 years (1750 hours).
Research outcomes	Intervention supporting organizational redesign and dealing with employee resistance. Knowledge about cognitive barriers in employee resistance to empowerment efforts.	Inter-organizational collective case to produce theoretical account of leadership constellation dynamics during phases of change, including various couplings with organization and environment.	Detailed, contextually specified changes in residence life, with focus on routines as micro-process of organizational dynamics. Everyday and locally situated action.
Analytic work	Content analysis for first-order analysis, which seeks to faithfully represent events surrounding intervention. Followed by second-order analysis in which researchers offered interpretations of data in first-order analysis.	Temporal bracketing to decompose chronological data for each case into successive discrete time phases providing comparative units of analysis.	Detailed descriptions of routines over time. Used theories to help make sense of observed micro-processes of organizational dynamics.
Findings	Change in decision-making schemas includes an important phase of testing and comparing old and new schemas in relation to the actions of managers and other employees. Until there is a match between the new schema and the actions of organizational members (managers and employees), employees will remain sceptical of the new schema and may not embrace it.	Change is feasible but as complexity and pluralism increase and slack resources become scarcer, conditions to protect initiatives long enough to sustain them are difficult.	As they are enacted, organizational routines (practices more generally) not only require but also create resources. In this way, organizational change is transformed by the process of changing.
Process model offered	Four phase model of change in decision-making schemas, including phase of schema comparison in which either old or new schema will be reinforced. This elaborates Lewin's change theory, suggesting a relocation sequence, which first involves addition of new schema and then elimination of old schema.	Three levels of coupling – strategic, organizational and environmental – that must be mobilized to permit change. Difficult to maintain coupling at all levels simultaneously.	Cyclical. Ongoing, incremental change can occur as result of endogenous organizational processes, if resources and schemas are understood to be fluid rather than fixed.

We end this chapter with a note concerning how qualitative researchers are simultaneously present and differently present in change. All of the profiled studies depicted change as non-linear, that is, taking twists and turns, and often being filled with uncertainty and "cacophony". Since qualitative research enables researchers to be present in the day-to-day action in the organization, the "flow" of the "flowing soup" (Weick, 1995) of change is particularly evident. Yet, this poses the particular and, we argue, highly significant problem of "getting a handle" on that flow rather than becoming overwhelmed by it. The studies profiled in this chapter have accomplished this task and thus provide insight on how to deal with the ubiquitous and amorphous actions and interactions taking place in the day-to-day natural situations of change. Specifically, action research allows researchers to frame an episode of change from the perspective of intervention. Initial intervention marks the beginning of an observed episode of change, while its conclusion marks its completion. The collective case study enables researchers to temporally bracket periods of stability over the course of change, which become units for comparison and subsequent insight. Ethnography, perhaps the most difficult pathway in which to define momentary stability in change, requires judicious iterative decisions that enable researchers to discern and follow particular themes, transition points or significant events within the plethora of data available. As Feldman (2004:298) noted, "As I attempt to pull out and follow one strand, I must make decisions about what constitutes a strand, and about what surrounding fabric needs to be explained in order to make sense of the strand".

In closing, we encourage those interested in investigating – or continuing to investigate – change dynamics to read relevant studies for both their findings and particular qualitative methodological approach. In this way, we can enhance our theorizing of qualitative, longitudinal methodology to draw on as an important resource in the theorizing of change dynamics in organizations.

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