Handbook of Research Methods in Diversity Management, Equality and Inclusion at Work

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22 Drawing from the margins: grounded theory research design and EDI studies

Elizabeth L. Holloway and Harriet L. Schwartz

INTRODUCTION: GROUND THEORY RESEARCH DESIGN AND EDI STUDIES

Grounded theory as a study of social processes is well-suited for scholar-practitioners who seek to understand the everyday exclusion that occurs in organizations. In this chapter, we examine research studies that have aptly applied grounded theory methods for studying the workplace experiences of marginalized individuals as well as effective inclusive and diversity practices in organizations. We follow this discussion with a closer look at particular aspects of the grounded theory method that enhance the opportunity to uncover the overt discrimination and subtle interactions that serve to reinforce cultures and climates of privilege and marginalization in organizations. The chapter concludes with the limitations of grounded theory method and recommendations for applying grounded theory methods and research to equality, diversity and inclusion (EDI) practice.

The potential of grounded theory to uncover the elusive qualities of the workplace, take the researcher beyond hegemonic understandings of organizations, hold as central the participants and their stories, portray complex interactions, include an intersectional stance and make visible the role of silence, are all elements that situate grounded theory as a viable and powerful method for EDI research. Later in this chapter we discuss several ways in which grounded theory aligns with EDI questions and priorities including the centrality of participants and their stories and a striving to avoid tacit (and thus often privileged) understandings of the workplace. Still the emergent nature of grounded theory makes the researcher’s awareness and sensitivities critical in the research process (Green et al. 2007). The research question, participants and analysis are all influenced by researchers’ understanding. So, for example, a researcher operating with little awareness of subtle indications of racism or sexism in a workplace may not notice these dynamics in the course of a study, and thus the racism or sexism would never be identified or reported. While this can be said for any research method, we note it here to clarify that grounded theory is not immune from this possible limitation, because it does not inherently
provide a critical lens essential to EDI studies. Grounded theory research seeks theory from the phenomenon itself and does not approach the research from a particular theoretical position, whereas researchers beginning with a critical or feminist theory lens start with questions of power and under-representation. However, as we convey throughout this chapter, grounded theory is a powerful method for EDI researchers who bring a critical awareness to their work as it sets the stage for uncovering subtle structural factors that serve to reinforce power and marginalization and to amplify the voices of those who are often disregarded or silenced. For thorough explorations of grounded theory and EDI-relevant perspectives such as feminist and critical theory, we refer readers to other works where these connections and tensions are considered (Kushner and Morrow 2003; Gibson 2007; Green et al. 2007; Olesen 2007).

POSITIONALITY

Trustworthiness is a central criteria of rigor for constructivist research and is highly relevant to EDI research. As such, our positionality is critical as we approach this chapter as educators, collaborators and scholar-practitioners. Elizabeth was raised as an Anglo-Canadian and now holds bi-national Canadian and American citizenship. She identifies as a white heterosexual cisgender woman. Elizabeth is educated as a counseling psychologist and applies this knowledge as an educator and consultant on organizational behavior and change. In particular, her focus is on disruptive and disrespectful engagement that impacts human suffering and productivity. Harriet grew up in the United States and identifies as a white, Jewish, lesbian, cisgender woman. Harriet teaches social and cultural foundations in counseling and engages in anti-poverty and anti-racism work. In our research, as reflected in this chapter, we embrace a constructivist and postmodern approach to the method. We are aware that we enter this chapter, and all of our work, experiencing race in particular from a privileged position. We also experience marginalization based on gender and in some cases, other aspects of identity. While we have tried to keep in mind the potential experience of researchers working from marginalized identities, we acknowledge that we often move through the world with privilege and inherently write from that perspective.

THE EVOLUTION OF GROUNDED THEORY

The inception of grounded theory methodology (GTM) by Glaser and Strauss (1967) heralded a new beginning in qualitative research in
sociology. It brought to qualitative methods current at the time a rigor and system of analysis that had the potential to create substantive theory grounded in the experience of everyday life. Today GTM has found a legitimate audience of scholars not only in sociology but also in nursing, education, psychology and organizational studies, among other fields of human and social sciences. The second generation of grounded theory methodologists has evolved the method from a post-positivist stance (Glaser 1978) to a constructivist (Charmaz 2006) and postmodern (Clarke 2005) approach to meaning-making. Charmaz introduced the significance of the co-construction of meaning between the researcher and the participant in the act of gathering and interpreting data, and the need for a reflexive transparency of researchers’ role in the creation of meaning. Her argument regarding the co-construction of meaning remains consistent with the philosophical grounding of GTM in symbolic interactionism (Blumer 1969) and George Herbert Mead’s pragmatism.

Symbolic interactionism views meaning as having a different source than those held by the two dominant views . . . It sees meaning as arising in the process of interaction between people . . . The meaning of the thing for a person grows out of the ways in which other persons act toward the person with regard to the thing . . . Thus symbolic interactionism sees meanings as social products as creations that are formed in and through the defining activities of people as they interact. (Blumer 1969, pp. 4–5)

Clarke (2005) has taken a postmodern approach to grounded theory. She moves beyond the understanding of co-construction of data and reflexivity to recognizing the importance of macro and meso political, social and cultural forces that impact the micro social processes of the human experience. She provides us with a series of maps that draw attention to those human and nonhuman factors in phenomena that may be salient to explaining and interpreting the events. Her approach opens the field of understanding to recognize interactions that may be rare but highly influential; it allows for noticing those players who might otherwise be overlooked and unheard. This approach is dramatically different from traditional grounded theory where the emphasis is on the basic or dominant social processes in a given situation. Such an emphasis is likely to sustain a privileged perspective. Charmaz (2005) corroborates Clarke in her understanding of the role of grounded theory in social justice studies.

Grounded theory can provide analytical tools and approaches to move social justice studies beyond description, while keeping them anchored in their respective empirical worlds. ‘Not only are justice and injustice abstract concepts, but they are, moreover, inactive processes, made real through actions performed again and again’ (Charmaz 2005, p.508,
original emphasis). At this juncture grounded theory is well poised as a powerful method for bringing heretofore unseen and unnamed substantive theory to EDI studies.

GROUND THEOREY AND EDI: AN ELEGANT FIT

Grounded theory calls on researchers to begin with the question, ‘what all is going on here?’ Guided by this question, grounded theorists seek to understand social processes through the experiences of individuals. This approach is consistent with the shift in EDI literature from studying and striving for diversity to studying and striving for inclusion. While diversity tends to be understood via the demographics of a group or organization (Roberson 2006), inclusion comprises ‘employee involvement and the integration of diversity into organizational systems and processes’ (Roberson 2006, p. 228). Shore et al. (2011, p. 1262) extended the definition of inclusion, suggesting that employees’ experiences in the work context satisfy ‘the needs of both belongingness and uniqueness’. Also, Booysen (2014, pp. 298–9), writing about inclusive leadership in organizations, stated: ‘Inclusive leadership extends our thinking beyond assimilation strategies or organizational demography to empowerment and participation of all, by removing obstacles that cause exclusion and marginalization . . . In a truly inclusive workplace or environment, all people from diverse backgrounds will feel valued, respected, and recognized.’ Grounded theory positions researchers to go beyond demographics, policy, and programming to explore workplace climates and cultures from the perspectives of those who live it.

In an example of the alignment between this disciplinary conceptual move and grounded theory, Dollarhide et al. (2013) studied the experiences of school counselors of color. Consistent with the shift in EDI literature, this grounded theory study went beyond investigating the numbers of counselors of color in a region or school system and, instead, considered the experiences of these counselors. The study revealed that the counselors had racialized experiences of their workplaces, positive experiences that recognized their uniqueness and negative experiences, including bias and disrespect from all constituencies. The counselors described positive racial events in which they saw themselves as role models not only for students but also for parents and staff, were able to connect with diverse students and served as advocates in the school. Conversely, they also experienced microaggressions and microinvalidations (Sue 2010) as well as exclusion. These negative events and the pressure to positively represent their identity group(s) were emotionally draining and disempowering, generating anger...
and frustration. While the positive events met the need to retain their identity and belong, the negative events created a powerful, damaging force in the school counselors’ experiences.

In another study that shows how grounded theory can be used to explore inclusion, Groggins and Ryan (2013, p.266) explored a non-profit vocational rehabilitation program known for its ‘positive climate for diversity’. They sought to identify elements of an inclusive organization by studying the employee experience as opposed to simply exploring diversity initiatives as implemented by leadership. Themes that emerged from this grounded theory study illuminate what goes on in an inclusive organization: a norm of accommodating employee needs (for example, special chairs, transportation and language proficiency training), respecting differences, ongoing learning within the organization, and maintaining a physical structure that prioritizes inclusion and person-environment fit. The stated goal of Groggins and Ryan’s study was ‘to gain insights into when “diversity works”’ (Groggins and Ryan 2013, p.265), and grounded theory allowed them to explore this by considering experiences of individuals within an organizational system. Their findings suggest that the studied environment met employees’ needs to have their uniqueness recognized while also fostering a sense of belonging (Shore et al. 2011).

A distinguishing feature of grounded theory is deliberate pursuit of theory grounded in the experience of persons inside the phenomenon of interest. Particularly important to EDI researchers, grounded theory is an effective method to ‘apprehend and monitor the intangibles or elusive qualities of a work environment that contributed to feelings of exclusion’ (Jackson 2000, p.26). This privileging of the experience of persons inside the phenomenon and the subsequent building of theory based on their sense of their world, positions the method as particularly strong for EDI research and application of this research to practice. The nature of grounded theory questions: the centrality of participants and their stories; the exploration of the interaction between self and self, other, systems, and generated theoretical propositions; and theory grounded in the data. These elements powerfully connect the method to EDI studies. Grounded theory helps researchers move beyond hegemonic understandings of workplaces and professions, attend to intersectionality, and shift from a deficit approach to one that considers systems rather than marginalized individuals as sites of difficulty and foreclosure to opportunity. Moreover, grounded theory positions us to explore silence as an indication of power differentials, control, and marginalization.
Jackson’s (2000) study of the work environment for lesbian occupational therapists provides a powerful example of grounded theory’s potential in exploring workplace climates and cultures. Through interviews with occupational therapists and analysis of the data, Jackson (2000, p. 26) identified four processes that create and maintain heterosexist non-inclusive work environments: ‘heterosexual discourse, homophobic comments, assumed heterosexuality, and perceived stereotypes’. Grounded theory interviews that uncovered lunchtime and other informal conversations, workplace small talk such as when getting one’s identity (ID) photo taken, and common social gestures such as co-workers who assume a female colleague wants to find a man, become data for moving to higher conceptual levels and, in this case, a theory of non-inclusive workplaces. Consistent with EDI studies, Jackson’s findings problematize the workplace, not the marginalized individual, and also show how these work environments impede professional growth and foreclose advancement aspirations and opportunities.

**Beyond Hegemony**

Grounded theory positions researchers to avoid operating out of dominant paradigms and perspectives when studying social processes and to push beyond accepted reflexive assumptions about the work world. The questions that grounded theory positions us to ask help us see how inquiry is influenced by embedded cultural assumptions stemming from systems of privilege and marginalization. Who identifies what we are seeking to study? Who decides what is important? What might be sensitive regarding the population we are working with and the data we are gathering? What is the researcher’s stance?

Using grounded theory, Fisher et al. (2010) explored the gendered and emotionalized nature of how work commitment is understood. They identified themes that reveal the hegemonic gendered nature of common understandings of workplace commitment, including flexibility (the ability to work whenever asked) and presenteeism (being visibly present in the workplace for extended hours, including weekends). Flexibility and presenteeism are options for people (historically, men) who are not primary caregivers for children or older adult family members. Flexibility and presenteeism as visible and reflexively valued evidence of work commitment thus position many women to appear uncommitted to their work. A framework based on flexibility and presenteeism has no regard for what women bring to the organization when they are working and their ability to manage time effectively, perhaps not needing long hours to complete...
work and meet deadlines. Management decisions regarding promotion and salary increases may be made based on these embedded understandings of work commitment that can disadvantage women and also men who take on family caregiving responsibilities. This grounded theory study dissected these tacitly understood and accepted indicators of commitment, positioning practitioners to reconceptualize a framework of workplace commitment with an understanding of the historical gendering of the concept and from an informed gender-inclusive perspective. In addition, this study supports the systems approach of EDI, locating the problem of women’s (and some men’s) lack of career advancement with the socially constructed understanding of commitment rather than with individual failure to meet a standard which maintains male advantage in the workplace.

The Centrality of Participants and Their Stories

The positioning of participants and their stories in grounded theory is central to the method’s relevance to EDI studies. ‘We cease to use the term “story” as metaphor and have come to view it as concrete reality, rather than a construction we place on these data’ (Charmaz 2005, p. 526). A critical approach pushes us to consider the following questions: what story are we telling, whose story is it, is it being told by those who are privileged or marginalized, and for what purpose are we furthering the story (or in the case of grounded theory, for what purpose are we furthering theoretical propositions and theory).

The centrality of participants and their stories is also relevant for EDI studies as it positions the researcher to delve below traditional measures of diversity such as the number of minority employees and the existence of non-harassment policies; instead it positions the researcher to explore the experience of marginalized groups and structural inequalities in the organization. In grounded theory, phenomena are understood as social processes, and it is in exploring these social processes that researchers can understand the lived experience of members of organizations and thus clarify whether the environment is experienced as inclusive by the very people who are most likely to be marginalized. For example, while overt racism is no longer acceptable in many organizations, racism may still manifest covertly via verbal, behavioral and environmental microaggressions (Sue 2010). Verbal and behavioral microaggressions transpire via social interactions; thus, grounded theory is an ideal method to explore this workplace occurrence as experienced by marginalized employees. Hernández et al. (2010, p. 202) used grounded theory to explore ‘adaptive responses that mental health professionals of color use to cope with racial microaggressions in their professional lives’. The researchers identified
eight strategies used by professionals to cope with microaggressions in the workplace: identify key issues that can inform response; self-care; spiritual practice; confront the source of the microaggression; connect with white allies for support; document microaggression occurrences; mentor colleagues; and organize group responses. In this example, grounded theory allowed researchers to see beyond the number of minority hires and formal policy to uncover the work environment as experienced by people of color, thus privileging the voices of those who are marginalized.

Another example of grounded theory and centrality of participant stories is a study regarding the experiences of young female athletic trainers in National Collegiate Athletic Association (NCAA) Division 1 athletics (Burton et al. 2012; Mazerolle et al. 2012). The researchers wanted to explore the lack of women head athletic trainers at the Division 1 level (the numbers are disproportionate to the number of women who work in the field). While a non-EDI approach might have located the lack of career advancement within the choices and experiences of women in the field, Burton et al., working from a poststructuralist feminist frame, sought to consider the role of power and gender stereotyping in the lives of these women. The findings showed that women athletic trainers face frequent challenges to their competence by male coaches. Findings also showed that male coaches used their position of power and gender privilege to block women from working with men’s teams (generally higher-profile and higher-paid jobs) and in other ways prevented their advancement in the field. The gendered harassment and oppression was so severe that it caused some women to foreclose on opportunities for advancement.

Interaction of the Self with Self, Other and Systems

Interaction of the self and systems is critical in EDI, and grounded theory positions the researcher to explore these interactions: self to self, self to other and self to system (including both human and non-human actors). Löve et al. (2011) studied the experiences of highly educated young women working in male-dominated professions (law, medicine, economics, engineering and architecture). Using grounded theory, they focused on stress and recovery and identified finding balance in daily life as the main concern of women in the study. While this might seem to be an expected finding, grounded theory methods allowed the researchers to understand this finding on a deeper level as it related to self, others and systems. The grounded theory analysis revealed that the struggle to find balance was driven by extensive ambiguity overload in which significant uncertainty required ongoing and exhausting evaluation and decision-making in an attempt to meet the expectations of self and others. The women in the study also struggled with the tendency to
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take on too much and to compare themselves to external references regarding performance, looks, and possessions. They often postponed health, a term the authors use to describe prioritizing work over self-care (Löve et al. 2011, pp. 6–7). Women in the study also described their experiences with sexism in the workplace as well as exclusion from informal (male) networks. This study shows the interaction of these women with self as they internally navigate ongoing ambiguity and struggle to meet their own expectations; with others as they attempt to set boundaries and deal with sexism among colleagues; and with systems as they work within gender-based structures. These findings paint a nuanced picture of the seemingly-familiar concept of striving for balance by examining self in relation to self, others, and system and also supporting the systems perspective that systemic discrimination and marginalization rather than individual shortcomings create stress in the workplace and block opportunities.

**Intersectionality**

Grounded theory positions researchers to collect and analyze data from an intersectional perspective. Grounded theory approaches such as the emergent analytical process and theoretical sampling allow researchers to pursue indications of intersectional forces in the studied phenomenon. For example, Nelson et al. (2006) recognized the intersection of class and race amid data collection, and the grounded theory practice of theoretical sampling allowed them to pursue intersectionality intentionally. Nelson et al. (2006) studied the experience of college faculty who came from lower and lower-middle class childhoods. Early in the study, they identified a connection between social class and race/ethnicity. Using theoretical sampling (discussed later in this chapter), they intentionally recruited participants to further explore this intersectionality.

Jackson’s (2000) study of the experience of lesbian occupational therapists provides an additional example of intersectionality emerging in the course of a grounded theory study. When exploring the nature of homophobic comments, the researcher noticed that lesbian, gay and bisexual (LGB) employees in lower-status positions were more likely to be the targets of direct homophobic jokes and comments than were LGB employees in higher status positions, thus revealing the intersection of class and sexual orientation in the workplace.

**The Role of Silence**

Contemporary postmodern, constructivist grounded theory approaches also emphasize the role of silence uncovered in the analytical process.
Silences on the individual level (Charmaz 2002a, 2005) and in organization and social world spaces (Clarke 2003, 2005) can provide a window into power and control. ‘The “right” to speak may mirror hierarchies of power: *Only those who have power dare to speak. All others are silenced*’ (Charmaz 2005, p. 527, original emphasis). For example, who is willing to be interviewed in a particular organization may indicate who has power or at least feels safe; similarly, recognizing who is not willing to be interviewed may indicate fear and vulnerability.

Making stories problematic and attending to silences offers new possibilities for understanding social life for both social justice and grounded theory research. What people in power do not say is often more telling than what they do say. We must note those who choose to remain silent, as well as those who have been silenced. (Charmaz 2005, p. 527)

Valicenti (2012) found that women serving on boards were often ignored or treated with condescension by male board members. It was rare that men in the sample acknowledged this dynamic, and this re-enacts in interviews the very experiences that the women reported. This is also consistent with the idea that those operating from a marginalized position must be aware of the dominant group but that members of the dominant group do not have to attend to the experiences of those who are marginalized.

As this review of the literature shows, grounded theory is a powerful methodological option for researchers seeking to explore EDI questions.

**GROUNDED THEORY METHODOLOGICAL APPROACH: FROM THE MARGINS**

In this section we explore the use of grounded theory (GT) as particular to EDI studies. Much has been written about GTM, and the methodological approach has been carefully described as the method itself matured. As the method gained popularity, founding and second-generation research scholars saw the need to codify procedures rather than to depend on an apprenticeship model for teaching graduate students and other newcomers to the method. As a result books and articles abound regarding the use of GT method (see ‘Recommended reading’ section). Nonetheless, it has been our experience as teachers of the method that there remains a gap between reading the method and applying it to a specific research area. During the research process, emergent findings may influence the course of the research design, thus guiding the direction of the research requires a deeper understanding of the flexibility and boundaries of the method that comes with experience. Throughout the EDI research process there
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are challenging decisions that must be made to balance the meaning the participants bring from their experience; the researcher’s own personal and received theory; cultural context; the pervasive presence of power, privilege and marginalization; and the integrity of the principles of the method itself. In the remainder of this chapter, we explore dynamic decision-making as it emerges in grounded theory research by describing the processes and sharing examples from EDI literature as well as our own studies and those we have supervised. Figure 22.1 depicts the iterative processes involved in engaging in the GT method from the initial research question to the final research report.

In the subsequent discussion, we describe and illustrate more fully six phases of the research process. However, we are not suggesting that these phases are strictly linear or discrete for the work often circles back
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to an earlier phase to enhance theory development. To simplify cross-referencing from the text to the figure, we have enumerated the six phases in Figure 22.1. The circular rendition of the work is intended to depict this iterative nature of the researcher’s analytic process.

**Positionality and Moving beyond Embedded Assumptions**

As researchers, we begin with a perspective that reflects our own positionality as well as an inherent interest and, perhaps, a passion for the phenomenon we intend to study (see Figure 22.1, I). Our understanding has been framed by our social cultural understanding, our received knowledge and our personal theory about the nexus of the phenomenon. When we cannot make sense of the experience, when it does not fit neatly into our current frameworks, we are curious and driven to understand. Schatzman (1991) has spoken to the emergence of human curiosity as expressed in the question, ‘what all is happening here?’ When we, as humans, are at a loss because previous understanding of similar contexts does not explain the social phenomenon, then the situation is problematized. We begin a process of trying out different approaches to make sense of our experience. This natural human process is mimicked in the work of GTM.

This is particularly relevant to EDI studies. For the passionate EDI scholar who may hold privilege in the studied phenomenon (for example, a cisgendered scholar who wishes to study the workplace experience of transgendered employees) as well as researchers who live the experience from a marginalized position, issues of inclusion and equality are charged and emotionally intense; thus, EDI researchers may default to received knowledge and familiar theoretical and research frameworks. Schatzman (1991) speaks to this natural human tendency to make order and relieve the anxiety of ambiguity.

Rarely if ever do we abandon prior theoretical or methodological anchorage. The more problematic and compelling (for action) the experience, the greater the urgency quickly to find a substantive model that approximates the experience . . . The analyst will probably resort to natural intuitive methods to construct a situationally-sufficient understanding. (Schatzman 1991, p. 306)

In EDI studies, researchers are dealing not only with the human drive to resolve uncertainty but perhaps also the pain of injustice which could again cause us to fall back on familiar paradigms rather than seeking alternative understandings of meaning. Grounded theory methods help us move beyond our existing mental models as depicted in the phase I circle of Figure 22.1 – positionality, pre-conversations and the role of the research team.
Pre-conversations
To move beyond the accepted understanding and solutions in the area of interest (both our own and those presented in the dominant discourse), we intentionally engage ourselves and our students in pre-conversations with people who have had direct experience with the topic of interest. This may serve to enlighten researchers who are essentially outsiders to the phenomenon as well as those who live the experience and have also formed their own personal and political approaches to the situation. These pre-conversations are generally informal but critical in guiding the research direction and ultimately forming the research question in a manner that privileges the experience of those who live it.

Pre-conversations also serve to move the focus of the research outside the dominant theoretical discourse that privileges the dominant voice. The dominant literature discourse is more likely to reflect the privileged hegemonic experience and worldview and is often influenced by what is politically popular and institutionally powerful (Green et al. 2007). What gets published, who gets published and where it gets published in the world of top-tier journals and mainstream media may still be controlled by gatekeepers operating out of a dominant paradigm and with dominant-group priorities. Pre-conversations can serve to elevate under-represented and even silenced perspectives.

One of our students who was studying the collaborative relationships of white and African-American women in cross-race working relationships engaged in two types of pre-conversations to situate herself and to design the research project. First, she conversed with senior white female cross-cultural scholars regarding their research experiences. She wanted to anticipate what might arise for her as a white woman working in the area of cross-cultural studies. She was also sensitive to her position as a white woman seeking to interview African-American women about their relationships with white women and hoped to learn how to approach these dialogues with sensitivity and respect. She also became aware of how her identity might influence the trust that she could engender with participants and thus the depth and candorthat might be available in the interview. Additionally, in her pre-conversations, Geiger (2010) became aware of how interviewing both members of a collaborative partnership might interfere with that relationship and thus changed the design of the study so as not to interview and intervene with matched pairs (Geiger and Jordan 2014).

The research team
Another strategy to uncover and move beyond tacit assumptions is to work with a research team. The formation of the team, development of
the team culture and ongoing engagement with the team are all discrete and yet clearly connected elements of unlocking the potential of a research team to enrich the scope and process of the study. In our work with graduate students, we deliberately form teams that bring together a variety of worldviews, different levels of experience both with the method and with the phenomenon of interest, and members who will bring various levels of positional identity and relational power. With differing statuses in the academy, positional power and privileged or marginalized identities, a team could easily enact and reinforce these power differentials and thus contradict the very principles of work equality and inclusion. We discuss these power differentials within the group to create a space where all members can speak, be heard and challenge others. In this way, we aim to build a cohesive team that can question biases and assumptions that are influencing the approach to the research topic. Before the research begins, we engage the research team in a conversation that addresses the underlying assumptions each of us has about the phenomena to be studied. We all have sensitizing concepts as we come into an area of study (Clarke 2005). However, we do not identify these to bracket (earlier suggested by Glaser) but rather to gain awareness of how these assumptions may affect our interpretation.

By developing an awareness of each other’s assumptive worldviews in the process of making meaning of the data, we are able to assist each other in maintaining the boundary between our own favored understanding and the experiences and perspectives shared by those who are being interviewed. In addition, we strive to form a cohesive and trusting team so that members can be vulnerable, can challenge each other and can overcome conflict (and repair relationships), if necessary. A team that can work with this level of rigor and interpersonal and relational strength aids us throughout the study in privileging participant experience and meaning-making over our own tacit and cherished views.

At some point in the process, one person from the team will typically emerge as the research partner who will collaborate with the primary researcher(s) throughout the coding and interpretive stages of the work. The research partner engages with the researcher(s) and acts as a sounding board for the research in decision-making regarding theoretical sampling, saturation and hypotheses formation. Saturation refers to that time in the data analyses when no new ideas are being added to existing concepts nor are new concepts emerging from the data. At this point, the researcher may choose to stop data collection and focus on the interpretive phase of the research. Because the research partner has been immersed in the data from the beginning, the partner is a second voice to ensure that the emerging conceptualization is grounded in the data and decision-making around the point of saturation is not premature.
The Foreshadowed Research Question

In this phase (see Figure 22.1, II) the research question foreshadows the direction of the research project and is built on the reflections and knowledge gained from phase I. The GTM approach emphasizes the notion of foreshadowing the research question because even after the project has formally begun, the experience of participants could uncover different questions that result in a shift in the focus of the work. This GT principle of allowing for a shift in focus is essential in honoring EDI. Researchers need to listen closely with openness to the perspectives brought by those inside the experience in spite of the fact that it may contradict their preconceived ideas and those of the extant literature on the topic –that is one of the major strengths of the GTM, providing for a shift in focus to expand our knowledge based on data from those who live the phenomenon under study. For example, Elizabeth was conducting a study on supervisory practice in the European Union. Her research interest was in the relational experience of advanced professionals receiving ongoing supervision of their work. She began by asking: ‘What is your experience in supervision?’ Although in several countries this was culturally appropriate, she found when conducting interviews in the Netherlands, the participants were struggling to recount experiences of supervision. In the second interview a participant exclaimed that supervision was not a concept familiar to their work, but rather intervision was a strong Dutch tradition rooted in the value of equality regardless of position. At that point, the focus of the research shifted to exploring the role of intervision in the Dutch organizations and led to a theoretical sampling of the founders of intervision in the workplace.

Once the study’s topic is crystallized and the foreshadowed question is determined, the next step is to consider whose perspective will be sought, and what population will be sampled.

The purposeful sample

Initial sampling has two important objectives. The initial sampling is a purposeful sample that seeks to engage individuals and discourse relevant to the purpose of the study (see Figure 22.1, II). The purpose is not to establish a randomly selected sample from the population, but to deliberately invite individuals in roles who have experience in the phenomenon. Who are those individuals? Researchers may only seek a sample which is part of the established discourse on the subject of study rather than looking more deeply for an omission of voices that could contribute to that discourse. For example, Dispenza et al. (2012) found in reviewing the literature that most studies regarding transgender people in the workplace
either focused on male-to-female transpersons or on both male-to-female and female-to-male which often obscured the experience of the latter group. They decided to focus their study on female-to-male transpeople in the workplace, thus giving those voices more presence in the discourse.

While Dispenza et al. (2012) identified an under-represented group via the literature, Clarke (2005) provides another strategy. Clarke suggests three types of mapping and analysis: situational maps, positional maps and social worlds or arenas maps. Clark presents the strategy of creating an abstract situational map which assists the researcher in naming all of the potential relevant human and nonhuman elements that may play a role in the situation of study, and these elements are framed by the researcher and those who are inside the experience. Notice the importance that the pre-conversations may play in the researchers’ development of the abstract situational map. As suggested by Clarke (2005, p. 87), we advise the research team to answer Clarke’s key questions in reference to the research topic: ‘Who and what are in this situation? What elements “make a difference” in this situation?’ The team then generates what is named a ‘messy’ version of the situational map, and ideally this team-based process not only identifies obvious players and non-human elements but also those who are marginalized or unseen. Clarke emphasizes the importance of considering the nonhuman elements that may affect the dominant discourse. These might include spatial and structural aspects of the organization, technological impacts, temporal elements such as historical or seasonal influences, and contested and political issues in the culture of the organization. The latter of which may be a prominent area of exploration in EDI studies. Clarke (2005, p. 86) suggests creating positional maps which serve ‘as simplification strategies for plotting positions articulated and not articulated in discourses’. A third kind of map suggested by Clarke is the social worlds or arenas map. Clarke defined this as an opportunity to name the social arenas in which collective commitments, relations and sites of action take place. Uncovering these arenas is critical in understanding the deeper forces that shape and drive social interactions and culture, and this is essential in EDI studies. For example when trying to understand an oppressive organizational culture, we must consider all voices relevant to the phenomenon. We remind our students that studying a complex and unfamiliar organization or industry is like traveling to a city that they have heard about but never visited. A first-time visitor is likely to see the most obvious attractions but not notice the mundane neighborhoods, businesses and people that form the fabric of the city. For example, when visiting Pittsburgh (where one of us lives), a traveler is likely to visit the Cathedral of Learning and the Carnegie Museum. Both are prominent American statements of wealth and power. Just as these landmarks dominate the landscape and obscure
the nuances of the region, so, too, can interviewing only high-level leaders obscure the day-to-day experience of those who work in the organization, particularly those who lack power.

**Gathering data**

Grounded theory allows for many different sources of information to saturate and triangulate an understanding of the social situation of interest. These might include observation, field notes, interviews, and discourse materials including informal memos, email, more formal public policy documents or public relations materials. Charmaz and Keller (2016) have noted in constructivist GT that many researchers are primarily using interview data and thus emphasizing the perspective and experience of those inside the situation being studied. Thus, although we have used other sources of data in our work, we have referenced interviews as the primary source throughout this chapter (see Figure 22.1, III). When seeking to understand sensitive topics and/or sensitive populations, it is important to look for triangulation across the information being sought, the manner in which the collection takes place, and the cultural norms of that particular group. For example, the method of collecting data could easily exclude certain members of the group and potentially those members who are marginalized in the organization. Some groups and people in particular roles may only find it safe to report through an individual oral interview; others may prefer to be a part of a focus group; and still others may prefer to respond in writing. Moats-Gallagher (2010) intended to use freewriting with participants in a study regarding Arab–American relations post-9/11; the study, a situational analysis and narrative study, included Arab women from Qatar, Arab-American women, and non-Arab women in the United States. In pre-conversations with Arab women, she was told that some Arab women might not be comfortable writing and documenting in this manner owing to the culture’s oral tradition. She decided to offer participants the options of freewriting or focus groups.

At the onset of a session, I talked to the various groupings of participants and explained we could use freewriting, the focus group format, or a combination. I gauged their comfort level and we determined the best course accordingly. All groupings chose to do a combination, which made for an interesting mix of writing and speaking. For pairings of people who preferred to write less and speak more, I took notes on a flip chart and, in this way, captured their themes. (Moats-Gallagher 2010, p. 83)

Another consideration is the sensitivity of the language used in questions asked of participants. Dollarhide et al. (2013, p. 55), studying the experiences of school counselors of color, engaged a focus group to parse the language of the interview questions ‘due to the sensitive nature of the
inquiry, the desire to use respectful terminology, and the power structures inherent in this inquiry’. The researchers used insights from the focus group to revise the interview questions. In another study, Dispenza et al. (2012) engaged a female-to-male transperson to review a draft of the questions for appropriateness before beginning the interviews.

The privilege of gathering information from those who have not often been heard and are frequently excluded from the extant literature means that careful attention to how and why we collect the information and from whom we collect it must be considered from a methodological as well as an ethical perspective.

Memoing

Memoing is one strategy used in grounded theory to acknowledge the researcher’s reactions and presence in the interpretation of the data (Charmaz 2006). Reflexive memoing (Birks et al. 2008), which begins at the beginning of the research process, positions researchers to document their reflexive understanding of their reactions and presence in the field, particularly with regard to the interviewing and observational experiences (see Figure 22.1, III). In addition, memoing: includes emerging hypotheses; documents the codes, thoughts and perspectives that evolve during the analytical process; and keeps the researcher closely engaged with the data. This process of memoing provides researchers with a record of their connection to and understanding of the data as it unfolds throughout the research process. In the final stage of the research process, theoretical memoing assists the researcher in creating a theoretical framework that closely adheres to participants’ meaning-making of their experience. The greyed text in Figure 22.1 shows the different types of memos and their typical positioning in the research process.

Coding and Analysis

Coding is the act which links together the observations and information gathered and the identification of social processes and actions of the actors (see Figure 22.1, III and IV). Throughout the evolution of grounded theory method, scholars have used different labels to identify similar coding processes. The lack of consistency in naming has resulted in considerable confusion particularly for students trying to manage the complexity of the coding endeavor. Grounded theory researchers strive to move from participants’ descriptions of their experience to conceptual understandings and theoretical propositions. Thus, coding terminology reflects the progression from descriptive language found in the participant’s discourse to conceptual understanding. For an excellent summary of the various conceptual termi-
nology used by founders of grounded theory method, Glaser and Strauss, and second-generation authors Corbin, Charmaz and Clarke, we refer readers to Birks and Mills (2011, p. 90). For clarity throughout this chapter, we provide Table 22.1 which identifies the labeling protocol that we use with our students and is influenced by both first- and second-generation scholars.

Researchers bring their own worldview to the coding process and inherently interpret the participants’ experiences through that filter. Thus, in the moment of coding the data, researchers are vulnerable to overindulging their own conceptual frameworks to make meaning of the participants’ experiences. As is evident in the underlying philosophy of symbolic interactionism, the perceptions we bring to a context are formed from our own interactions in that same or similar context. There are several ways in which grounded theory strives to preserve the participants’ experiences throughout the coding process.

**Initial coding**

Initial coding in grounded theory includes line by line coding and *in vivo* coding. In this phase (see Figure 22.1, III) the coders pay close attention to the language and structure, intonation and metaphor embedded in the conversation. These characteristics of language are symbolic of the individual’s experience of social norms and cultural mores. Line-by-line coding allows for the particularities or idiosyncrasies of language to be carried forward into the conceptual structure in the development of theory. This identification of language particular to participants’ experiences is named *in vivo* codes and is a subset of the initial coding process. The initial coding process inhibits researchers from moving too quickly to applying concepts that are generally understood in the literature but not necessarily reflective of the participants’ described experiences. This is particularly relevant in

<table>
<thead>
<tr>
<th>Stages of coding</th>
<th>Coding nomenclature</th>
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</thead>
<tbody>
<tr>
<td>Initial coding</td>
<td>Line-by-line</td>
</tr>
<tr>
<td></td>
<td><em>In vivo</em></td>
</tr>
<tr>
<td>Focused coding</td>
<td>Conceptual categories</td>
</tr>
<tr>
<td></td>
<td>Sub-categories also called properties that describe the conceptual categories</td>
</tr>
<tr>
<td>Axial coding</td>
<td>Dimensions are broadened concepts that encompass categories and their properties</td>
</tr>
<tr>
<td>Explanatory or theoretical matrix</td>
<td>Dimensions are organized to explain the relationship and action of context, conditions, social processes, and impact</td>
</tr>
</tbody>
</table>
EDI studies where those generally understood concepts are likely to have evolved from the dominant paradigm or an outsider’s explanation of the social processes that occur inside the organization. Budge et al. (2010) noted that the use of in vivo codes was particularly important in their study of transgender people’s experience in the workplace. ‘Because this community uses a vocabulary not well known outside of the queer community, in vivo codes were used to look for the implicit meanings’ (Budge et al. 2010, p. 380, original emphasis). For an example of the initial coding stage including line-by-line and in vivo codes see Table 22.2.

Table 22.2 Initial coding: line-by-line and in vivo

<table>
<thead>
<tr>
<th>Line-by-line</th>
<th>In vivo</th>
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<tbody>
<tr>
<td>I don’t know if you’ve come across this, it seems to be a gender thing. Say</td>
<td>Gender thing</td>
</tr>
<tr>
<td>my colleague, students won’t talk back to him. He’s very collaborative, he’s</td>
<td>Students won’t talk back to him</td>
</tr>
<tr>
<td>very warm, but he’s a high status male. What I mean by that: He’s very</td>
<td>Male attributes</td>
</tr>
<tr>
<td>good looking, he’s tall, he’s just 40, he’s in command, like he is</td>
<td>Collaborative, warm</td>
</tr>
<tr>
<td>confident. He’s like a martial artist, so there’s this strength and</td>
<td>Good looking</td>
</tr>
<tr>
<td>confidence that he has. Students do not do to him what they will do to the</td>
<td>Tall, confident</td>
</tr>
<tr>
<td>rest of us. And so there’s a piece about power there, but also about</td>
<td></td>
</tr>
<tr>
<td>gender and relationships. He goes, ‘They don’t even talk in my class’,</td>
<td>Power</td>
</tr>
<tr>
<td>where with me they’ll be like, ‘oh, hi’, and we’ll be having this big – in</td>
<td>Gender</td>
</tr>
<tr>
<td>a good way. But it’s a very different dynamic, and I think it’s part of the</td>
<td>Relationships</td>
</tr>
<tr>
<td>power dynamic, and part of that’s gender and being a high status male.</td>
<td>Students treat woman differently</td>
</tr>
<tr>
<td></td>
<td>More casual</td>
</tr>
<tr>
<td></td>
<td>Good way</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note:* Bolded codes represent in vivo codes.
Focused coding

Once the initial data has been analyzed using line-by-line coding, the research team begins a focused coding that involves the categorical naming of the codes in an effort to group them together meaningfully (see Figure 22.1, III). The categories describe concepts which are a central element of understanding social action and interaction. ‘A concept (or construct) is a generalized idea about a class of objects, attributes, occurrences, or processes that has been given a name’ (Zigmund et al. 2013, p. 39). Concepts are used in everyday life to gather similar objects or social actions together as a whole. In grounded theory, a concept names a cluster of properties or attributes that are related as shown in Table 22.3. This table is arranged from left to right as it describes the building of the code structure from the smallest unit of codes developed in initial coding to increasingly more conceptual coding named sub-categories and categories developed during the focused coding phase.

The research team plays a critical role at this stage as different members of the team bring different perspectives to conceptual naming of the codes that have been rendered in the line-by-line process. There is often significant and important debate and negotiation around the concepts that will best represent the meaning intended by the participants. While the team may be diverse, at this point in the process it is often important in EDI studies to invite a cultural consultant who may not have experience with grounded theory but who identifies with the cultural group central to the study.

In focused coding the team continues to code new data and to attend to those instances in which established or new concepts emerge. Yet in spite of this move to a broader scan of the data, the coders are remaining actively involved with the narratives presented to them and scrutinizing for those instances that may not fit neatly into the concepts identified earlier in the coding. Noticeably rich passages that exemplify the emerging concepts can be used later to illustrate meaning and to provide the rich detail of participants’ voices. The constant comparative method of GT

<table>
<thead>
<tr>
<th>Codes from initial coding</th>
<th>Sub-categories</th>
<th>Conceptual</th>
</tr>
</thead>
<tbody>
<tr>
<td>High status male</td>
<td>Gender</td>
<td>Gender power</td>
</tr>
<tr>
<td>Students treat differently</td>
<td>Power differential</td>
<td>Faculty power undermined</td>
</tr>
<tr>
<td></td>
<td>Power in professor role</td>
<td></td>
</tr>
</tbody>
</table>

Table 22.3  Focused coding process: initial codes to sub-categories to conceptual categories
allows for the movement back and forth from the already analyzed data and new data being collected. The exercise of the constant comparative method invites new perspectives, understandings and frameworks to emerge from the data, rather than prematurely closing in on a theoretical framework that may not be inclusive of yet unseen perspectives. This iterative process is depicted in the circular representation of the analytic process in Figure 22.1 (III, IV, V).

Theoretical sampling
Theoretical sampling is a distinct process in GTM and promotes rich detailing and saturation of conceptual understanding. Charmaz (2006, p. 189) speaks of theoretical sampling as ‘the researcher seeks people, events, or information to eliminate and define the boundaries and relevance of the categories’. What makes this process of theoretical sampling an important tool for EDI research?

In the initial data-gathering process, the researcher is looking at the categories that emerge during the coding process. It is from these categories that certain hypotheses relevant to the participants’ experiences emerge. Some of these hypotheses may take the researcher in a different direction from that initially imagined (see Figure 22.1, III). At this point in the research process, there is the opportunity to follow a line of thinking that is related to a particular concept or category and to see greater detail in that area as the researcher forms an opinion about the confirmation or disconfirmation of its theoretical importance.

Theoretical sampling begins as the researcher seeks to go back to initial interviewees and ask more detailed questions, seeks new sources of information relevant to the concept of interest, or recognizes a player who may bring a different perspective to the social situation being studied. Grounded theory offers this unique opportunity to recognize emergent theoretical concepts and seek participants who can offer an additional and, perhaps, unexpected perspective. This process ultimately leads to a richer and more diverse and detailed understanding of the grounded theory by fully saturating the conceptual categories. For example, Nelson et al. (2006) began a grounded theory study of social-class jumping in academic organizations. Early in the coding process they identified an interaction between social class and racial minority status so they sought additional participants ‘whose experiences encompassed both’ (Nelson et al. 2006, p. 3).

Axial coding, dimensions and the explanatory matrix
As the work continues, the coding team also begins the process of axial coding or looking for the relationships among larger concepts in the frame-
work (see Figure 22.1, IV). As relational structures are built, frameworks begin to emerge that contend with the larger concepts of human action and interaction (called dimensions by some grounded theory scholars), the conditions under which these occur, the specific processes that ensue, and the consequences or impact that these actions and processes have on the context of the whole (Schatzman 1991). These relational structures have been called, variously, explanatory matrices or theoretical matrices (see Figure 22.1, IV). In working with material of EDI this is another vulnerable moment when researchers may depend on their own worldview to name conditions in which actions take place and the consequences which result, rather than reflecting the meaning that participants make of their experience.

In our work we find ourselves returning to the original transcripts, process notes and memos to check that our matrices are representing the meaning that the participants bring to the experience and its relevance to the topic we are studying. It is very easy to find the team at this point being divorced from the narratives and beginning to make up their own personal theory about what it is that happens, as they are deeply influenced by their own passion, emotion and prior conceptual frames of understanding. Because grounded theory provides a breadcrumb trail, the researcher can return to the data and trace the concept back to the original language and narrative of the participants. While working on a recent study, we paused while developing an explanatory matrix to return to the data to be sure our emerging understanding of one of the dimensions was congruent with the participants’ descriptions of their experiences. We discovered that we had, in some areas, begun to impose our own frameworks and, by returning to the coded data, we adjusted our thinking about the dimension so that it reflected the participants’ stories.

The explanatory matrices provide the researcher with a conceptual structure to examine the relationship among the dimensions in relation to the context, conditions, processes and consequences of the situation. In the next step of phase III, the conceptual challenge is to integrate the dimensions developed through the matrices into a grounded heuristic model that reflects meaning that the participants make of their lived experience. During this period a central or core dimension emerges from the group of dimensions identified. The core dimension is a unifying concept in which all other dimensions are related. Table 22.4 is an example of a theoretical matrix developed in a study conducted by Muriel Shockley and supervised by Elizabeth Holloway (Shockley 2013). The study was an exploration of the experience of African-American women scholars who worked in predominantly white universities. The core dimension identified in the analysis was ‘robust sense of self’ and all primary dimensions,
Table 22.4  Core and primary dimensions in explanatory matrix

<table>
<thead>
<tr>
<th>Context</th>
<th>Conditions</th>
<th>Social processes</th>
<th>Consequences</th>
</tr>
</thead>
<tbody>
<tr>
<td>White academy</td>
<td>Robust sense of self&lt;sup&gt;a&lt;/sup&gt;</td>
<td>Risking self&lt;sup&gt;b&lt;/sup&gt; Persisting&lt;sup&gt;b&lt;/sup&gt; Seeing and naming the whiteness of the academy&lt;sup&gt;b&lt;/sup&gt;</td>
<td>Exercising voice and agency&lt;sup&gt;b&lt;/sup&gt; Diss/ease&lt;sup&gt;c&lt;/sup&gt;</td>
</tr>
</tbody>
</table>

Notes:
<sup>a</sup> Core dimension.
<sup>b</sup> Primary dimensions.
<sup>c</sup> Critical category that was a potential consequence of exercising voice and agency.

Source: Created from original text with permission from Shockley (2013).

‘risking self’, ‘seeing’, ‘naming the whiteness of the academy’, ‘persisting’, and ‘exercising voice and agency’ were related to it. As shown in Table 22.4, each of the primary dimensions plays a role in the matrix as being context and conditions that influence social processes and consequences. Shockley describes the core dimension, robust sense of self, as it emerged from the women’s voices and as quite different from the stereotypic image of the strong, black woman who endures all:

Conversely, the robustness articulated in this theoretical matrix represents an internal process of self-knowledge and self-definition that feeds the African American women’s ability to resist objectification, confront injustices, and guide conscious and critical interactions with the environment. Robustness supports an individual’s ability to give voice to lived realities. This construct is about recovering and nurturing self and developing a black female critical consciousness that is enacted in the external world. (Shockley 2013, p. 142)

For a full description of these dimensions the reader is referred to Shockley’s (2013) dissertation. Next we will discuss the final analytic process which involves tendering theoretical propositions that emerge from the research as well as describing the central dynamic processes that govern the social phenomenon as experienced by participants.

Building Substantive Theory

The creation of a substantive theory is based upon the conceptual structure that has been created through the explanatory matrices. This analytic process is defined as the integration of the ‘attributes, interconnections, contexts, processes, and implications’ (Schatzman 1991, p. 309) that
emerged from the data. This leads to ‘their ultimate integration, providing an understanding or theory of “all” considerations seen as involved in the phenomenon and as constituting the “whole” of it’ (Schatzman 1991, p. 309). The depiction of the processes in this phase of diagramming, building visual models and posing theoretical ideas is seen in Figure 22.1, V.

This is another point at which the researcher might easily fall prey to relying on existing professional practice constructs or his or her own personal theory of what makes sense. At this level of analytical integration, it is very difficult for researchers to avoid using those constructs that are deeply engrained in their process of resolving problematic situations. Once again these tacit constructs typically emerge from a dominant paradigm; and once again, GTM can provide a way to discover when or if this is occurring and offer ways to move beyond such paradigms.

Another important consideration in building a substantive theory is use of reflexive and theoretical memos. The theoretical or hypothesizing memos are developed early in the data analysis when the researcher is beginning to form ideas. These memos may come from a number of different people on the coding team representing different perspectives, including an inside perspective. Again, to avoid defaulting to extant theories, researchers on the team should pay close attention to outlying theoretical ideas that have emerged in the memoing process. The process of building substantive theory does not happen in a linear fashion. It relies on the natural analytical processes of researchers as they try out different models that embrace central and peripheral concepts. In this process the researcher may find that concepts considered less central earlier in the analysis rise to a level of greater importance when considered as part of the whole. The researcher should feel comfortable allowing this shift to occur even at this stage of the analysis, remembering that grounded theory supports, and is founded upon, a constant comparative method that allows for fresh and new conceptualization by the researcher but always based on the perspective and meaning brought by the participants.

Diagramming, visual modeling and theoretical propositions
The job of communicating a set of theoretical ideas based on the substance of the study is not an easy task. During this phase of the analysis many grounded theory researchers find themselves integrating not only the concepts that have been found but also the relationship and movement between them – remembering that grounded theory is based on the social processes and the human interaction among the players. It is not a static but a dynamic understanding of what all is happening in the field of play. The use of diagramming at this stage has proven invaluable not only in reflecting back to the researcher the integrity of the connections being
made, but also by providing immediate visual feedback as to whether the model has heuristic value and is grounded in the data. We have spent many intense and inspiring hours at the dining-room table and the whiteboard, creating different diagrammatic forms to represent our analytical findings and the substantive theory that emerges. Shockley’s study (2013), as mentioned previously, illustrates the dynamic flow of social processes and their impact on the overall experience of African-American women scholars. Figure 22.2 illustrates the development of Shockley’s explanatory matrix (see also Table 22.4) to a model of interacting processes around the core dimension robust sense of self, which is a personal quality of strength that allows the engagement of persisting, risking self and seeing the whiteness of the academy. In turn, these internalized strengths are manifested outward in social processes that emerge in exercising voice and agency. The latter contributes to the increasing presence of robust sense of self and additionally with the potential to create times of diss/ease in the academy.

At first glance, grounded theory visual models may seem to simply represent the conceptualization of the data. However, these models assist the researcher in the process of constructing the substantive theory. The process of creating visual models is an iterative process in which the researcher continues to integrate, deconstruct and reconstruct the data until satisfied that the heuristic model honors the participants’ meaning-making and is a catalyst to articulate theoretical propositions. Researchers then aim to critique the visual model from the perspective of the community to determine if it is transparent and relevant to practice.

Reporting Out

The process of sharing the heuristic model with practitioners and other community members, often including participants, provides initial and ongoing opportunities to continue to refine the model (see Figure 22.1, VI). This may not be doable in all research studies; however, when it is possible, it invites participants themselves to lend validity and veracity to the researchers’ rendering of their experience into a conceptual and theoretical whole. Moats-Gallagher (2010) invited the Arab-American and American women who participated in her study to the dissertation defense that was held in a community setting conducive to their attendance and contribution.

Another advantage of sharing the model with the community is that sharing the model, rather than the quotes from the transcripts, protects the details of the narratives; this may be particularly important in EDI studies with topics that may be politically charged or culturally sensitive, and with participants who may be vulnerable. Researchers may also report
Grounded theory research design and EDI studies

Researchers also have a responsibility in choosing the outlets for publication. In some cases, the reporting of the study will have a greater potential for influence if published in a practitioner publication rather than a practitioner publication rather than a practitioner publication.

Source: Reproduced with permission from Shockley (2013).

Figure 22.2 Dynamic model of African-American scholars in the white academy

out in written form and use quotes. In some cases the quotes chosen may be audited by the participants to ensure that the use of the quote would not create greater vulnerability in the organization for the participant.
Handbook of research methods in diversity management

scholarly journal, thus bridging the gap between scholarship and practice as well as providing a wider access to the findings. Researchers should also seek out publication and presentation opportunities that will expose the work to higher-level leaders who are in a position to make change in the organization or the profession. This serves the needs of the community in creating change rather than embellishing the researchers' academic profile. Researchers may also choose to bring the study and, thus, an EDI perspective, to the mainstream scholarly literature to introduce this perspective into the discourse. There is also an important opportunity to give back by bringing the model to the community and relevant practitioners so that they may build new programs and create policy with greater insight into the perspective and needs of those that are often overlooked and unheard.

Criteria for Rigor

Throughout this chapter, we have attempted to present the research processes of GTM that enhance empirical rigor in the study of EDI. Qualitative research criteria for rigor rests on the principle of trustworthiness, that is, the ways in which the researcher inspires confidence in the findings for other researchers and study participants and their communities. Lincoln and Guba (1985) suggest that trustworthiness involves four criteria. The first is credibility, which indicates confidence that the findings represent 'truth' as voiced by the participants. The second is transferability, the potential applicability of findings to other similar contexts. The third is dependability, which is exhibited by consistency of the implementation and documentation of the method. The fourth is confirmability, which is achieved when the findings in the data are shaped by the participants and not by researcher bias. Adherence to all four criteria of trustworthiness is of utmost importance in studying EDI in organizations. The researcher's faithful application of GTM, with attention to the research processes highlighted in this chapter, will heighten the confidence of marginalized groups that findings are a credible and truthful representation of their perspectives and lived experience.

CONCLUDING REMARKS

Grounded theory distinguishes itself by bringing narrative and discourse into a conceptual understanding that has a strong resemblance to the everyday experience of organizational work. The method positions researchers to consider social processes as they dynamically unfold within a context of larger social systems and macro forces. Creating theory that
is grounded in these experiences provides an opportunity for scholar-practitioners to initiate meaningful and relevant change.

Grounded theory EDI researchers create theoretical propositions that provide a springboard for other scholars to engage in future research using new models that include the perspectives of those who would not otherwise be considered. The method of situational mapping is particularly relevant to understanding the intersection of macro institutional structures and the marginalization and exclusion of individuals and groups. Future scholars might take advantage of positional mapping of the public discourse around inclusion and the particularized experience of individuals who are excluded through the language and policy of the dominant culture.

Grounded theory has been criticized for its conceptual abstraction of the lived experience and such observations are not unwarranted – yet all research methods face this same critique. However, the GTM attempts, as much as possible, to recognize this potential limitation and address it through the iterative process described throughout this chapter. The purpose of GT is to go beyond description and create theory that can explain social processes that best address all constituents within those processes.

Nonetheless, one method alone cannot fully uncover the myriad of issues that surround EDI in organizations. Certainly, narrative research design has its place in bringing to light the stories of those that have been excluded, stories that are descriptive of events and emotions of the lived experience. However, the GT method focuses on the conceptualization of social processes and systemic influences that reify the dominant culture. Thus the organization is problematized, rather than the individual. This is a critical reframing for organizational consultants to recognize as they address EDI issues. In our experience, consultants have readily adopted some of the situational mapping and grounded theory methods to assess organizational challenges. Grounded theory positions researchers and organizational practitioners to explore and conceptualize social processes and systems that have created and perpetuated marginalization, discriminatory practices, exclusion and institutionalized, fossilized perspectives. From this perspective, GTM offers EDI research a valuable tool to explore these processes and systems.

RECOMMENDED READING

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