

4 CONTEXTUALIST RESEARCH AND THE STUDY OF ORGANIZATIONAL CHANGE PROCESSES¹

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Abstract

On theoretical, methodological, and practical grounds, this paper argues the case for conducting processual studies of organizational change. Such process studies may be conducted through a research approach which is not only longitudinal but also seeks to analyze processes in their intra-organizational and social, economic, political and business context. This paper outlines some of the epistemological and craft features of contextualist research and ends by posing questions about the evaluation of research conducted in a contextualist manner.

Contrary to the way the practice of research is often taught and written up, the activity of research is clearly a social process and not merely a rationally contrived act. Furthermore it is a social process descriptively more easily characterized in the language of muddling through, incrementalism, and political process than it is as rational, foresightful, goal directed activity. Indeed it seems naive and two-faced of us to recognize, on the one hand, the now familiar notions that problem solving and decision making processes in organizations have elements of political process (Pettigrew 1973a), incrementalism

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(Quinn 1980), and garbage can (March and Olsen 1976) about them and yet to continue to think of our own research activities in organizations as if they were exercises in technical rationality. As Beveridge (1950), Mitroff (1974), and others have told us, the reality of scientific activity has its artistic and subjective sides, and certainly the starting assumption of this paper is to regard research as a craft process and not merely the application of a formal set of techniques and rules.

Although the kinds of research tasks tackled by so-called qualitative researchers of their nature are more unstructured than those favored by more quantitative scholars, and on the face of it the craft metaphor may appear to fit the more interpretative process used by qualitative researchers, all research involves the application of skills, knowledge, and the person in a variety of different problems in varying contexts, and in that sense it is a craft activity involving skills of individual judgment within a system of collective rules and communication. But of course a system of collective rules and communication where, as Morgan and Smircich (1980, p. 491) remind us, “the choice and adequacy of a method embodies a variety of assumptions regarding the nature of knowledge and the methods through which that knowledge can be obtained, as well as a set of root assumptions about the nature of the phenomena to be investigated.” So even while we are a member of a community—an invisible and visible college—we are also carriers of different root assumptions nurtured and reinforced in the different societal, academic, and political contexts where we practice our craft. These root assumptions, when crystallized into the various academic subcultures, or paradigms, or rationalities which quite normally and naturally divide and identify us, provide the systems of meaning which inform the kinds of individual judgments we make in the research process: What we choose to study, how we choose to study it, what literature we do or do not read, how we develop relationships in research sites with whom, what we are capable of seeing and making sense of, how we make connections between concepts and data, our capacities for intuition, insight, persistence, craftiness, and courage in getting in and out of research situations, and the extent to which our research is useful for theoretical development and practice.

Once already in this paper I have used the convenient dichotomy between quantitative and qualitative research, although like most dichotomies I recognize it conceals as much as it illuminates. For one thing, much research of a qualitative character involves measurement, and measurement of an apposite nature, i.e., created and sensitively linked to the contextual nuances and systems of meaning in a particular site, or set of research sites. Apart from the fact that quantification by qualitative researchers confounds the quantitative/qualitative dichotomy, the more basic objection to the dichotomy is the fact that qualitative research stands for a set of approaches to research informed by the various rationalities or partial world views brought to a problem rather than just a particular set of techniques. The important thing to recognize then is not whether researchers can be divided along the qualitative/quantitative dimension and therefore to give exclusive credence to differences in method, but to ask more basic questions about differences in rationalities, assumptions, and orientations of researchers as they influence theory and method, and therefore the link between theory, method, and practice. Recent writing by Burrell and Morgan (1979) has been helpful in linking debates about research methods in the social sciences to assumptions about ontology, epistemology, and human nature, but that kind of broad paradigmatic way of classifying world views of researchers in organizational analysis has to be complemented by expositions

of a more practical, down to earth kind about the theory of method of research in action if we are to develop our understanding of the craft skills of organizational research.

At the level of mere technique or method, as I have just said, is too limiting a way of addressing questions of craft skill in action, one of the differences in the social sciences between so called quantitative and qualitative approaches is that the techniques and methods of the quantitative work have been so much more effectively turned into procedures which can be described, learnt, and then practiced. Given that the types of problems and kinds of questions asked by qualitative researchers are of their nature likely to be more indefinite, it maybe unreasonable and certainly unrealistic to expect the methods of qualitative researchers to be as readily proceduralised as they have been by scholars using quantitative approaches. But the fact that describing the craft of any professional activity is difficult—Schon (1983, p. viii) begins his recent book arguing competent practitioners usually know more than they can say—does not absolve even those purporting to be tackling indefinite problems

through inarticulate interventions, from trying to describe what they do. This is so not only because if there is more than the average amount of intuition, interpretation, and structuring through language in the qualitative research process then it is perfectly reasonable for the researcher interested in the analysis of processes to be hoist with his own petard and asked “if this is your outcome, tell me what process you went through to get there,” but also because younger scholars interested in doing research the qualitative way may derive some benefit from appreciating the theory of method practiced by a number of more experienced qualitative researchers. Van Maanen’s (1983) recent compilation of articles has helped to draw out some of the ideas about theory of method that maybe useful, but Chris Argyris (1970, 1982) and Donald Schon (1983) are rare amongst scholars in consistently and creatively thinking and writing about the craft of intervening in systems for the purposes of research and consultancy.

This brings me to the central question of this paper which is the extent to which research practitioners can say what they know about the craft process of doing research, given that most of their knowing in practice is likely to be tacit rather than expressed. The paper begins by trying to use some of the argument and language of Schon’s book *The Reflective Practitioner: How Professionals Think in Action*, and in particular his notion of the constants brought by professionals to their various interventions, to suggest that at some level theory of method can be so described. I follow this affirmative answer to the above question by briefly sketching out the ontological and epistemological base of contextualism as a theory of method described in the 1940s by the philosopher Pepper (1942) and recently interpreted by Payne (1975, 1982); and then move on to consider weaknesses in the current literature on organizational change, and how the theory and practice of organizational change could benefit from research grounded in a contextualist approach. The contextualist approach is then exemplified by my own current understanding of the theory of method of applying contextualism as a mode of analysis. The paper then goes on to argue contextualism offers some of the conditions for a natural identity of interest and opportunity to conduct research which is useful for theoretical development and practice. The paper ends by briefly discussing criteria appropriate for evaluating contextualist research.

Schon and Professional Reflection in Action

Schon's splendidly written book looks at five professions, engineering, architecture, management, psychotherapy, and town planning, and asks the question what is it that these professionals really do when they go about their daily business of solving particular problems? Having identified some constancy and variation in their pattern of working, he then moves on to consider how the skills he identifies can be enhanced and transmitted to others.

Eschewing narrow notions of professional practice as a rational-technical problem solving process, where there is supposed to be an objectively knowable world, independent of the practitioner's value and views, and where in consequence the practitioner has to behave according to norms of objectivity, control, and distance, Schon depicts professionals engaged in artful inquiry in problem situations typically characterized by uncertainty, complexity, instability, uniqueness, and value conflict. Although, as I have said, Schon begins by assuming that practitioners usually know more than they can say, he does not treat this as a barrier to understanding what professionals do. Artful inquiry or "artistry" is seen as, in part, the selective management of large amounts of information, the practitioners ability to spin out long lines of invention and inference, the capacity to hold several ways of looking at a situation up at once, and thus to conduct a pattern of reflection in action in a unique and uncertain situation. This reflection in action, a kind of patterned yet informal improvisation, he calls having a reflective conversation with the situation.

One constancy across the professionals was a mode of artful inquiry composed of a reflective conversation where the practitioner, whatever his starting point, gradually turned the encounter into a frame experiment, where literally a frame was simultaneously imposed on the situation while the practitioner remained open to the situation's back-talk. While operating in contexts with this pattern of reflective conversation, the practitioners also demonstrated variability in the constants that they brought to their reflection in action. Schon (1983, p. 270) lists these constants as:

1. The media, languages and repertoires that practitioners use to describe reality and conduct experiments.
2. The appreciative systems they bring to problem settings, to the evaluation of inquiry, and to reflective conversation.
3. The overarching theories by which they make sense of phenomena.
4. The role frames within which they set their tasks and through which they bound their institutional settings.

While labeling the above features of the inquiry process as constants, Schon does not imply they are set in concrete. He sees them as changing, sometimes in response to reflection on events of practice, but at a much slower rate than theories of particular phenomena or frames for particular problematic situations. Indeed without some level of constancy in world view and appreciative system, Schon doubts if reflection in act is possible. Without that constancy there would not be the intellectual space or confidence to allow particular theories' frames to engage with and perhaps be dismissed or modified

by back-talk from the situation, and inquiry could no longer have the character of a reflective conversation—it would become merely a series of non-additive, non-associative, disconnected episodes.

Although the above description gives only the briefest account of Schon's argument, enough of the skeleton has been revealed about the conduct of professional inquiry to suggest that there are parallels between the process as he sees it and the particular brand of inquiry called contextualism featured in this paper. Like Schon's practitioners, the contextualist does not begin with a unilateral interventionist stance dominated by values of objectivity, control, and distance under the assumption that scientific truth is out there to be discovered by a process of knowing, like some plum to be picked from a tree. Rather the contextualist begins with a more mutual stance, attempts to steer a middle course between involvement and distance, and recognizes the relative and multifaceted nature of truth amongst those in the research process. Concepts and meanings are thereby shared and traded in the research process, and in so far as acceptable definitions of acts in contexts emerge, they are discovered not so much by a process of detached knowing but are created by a process of making.

Thus I see Schon's notion of having a reflective conversation with a situation as paralleling the contextualist's desire not to singularly impose his concept of meaning on the actors in the research situation. As Spencer and Dale (1979) rightly argue, in qualitative and contextualist research processes, meanings are either decided by the actors, are negotiated between the actors and the researchers and practitioners, or it is clearly recognized there are multiple perspectives in the research setting.

But there are other parallels between Schon and the contextualist approach to research; chief amongst these is the situational nature of inquiry. Because in Schon's view practitioners face situations characterized by uncertainty, complexity, instability, uniqueness, and value conflict, then practice has at least as much to do with finding the problem as with solving the problem found. Finding the problem obviously requires detailed immersion in the problem setting. As we shall see, one of the core requirements of a contextualist analysis is the requirement to understand the emergent, situational, and holistic features of an organicism or a process in its context, rather than to divide the world into limited sets of dependent and independent variables isolated from their context. These central features of contextualism, the mutual nature of inquiry, the balance between involvement and distance, the notion that knowledge is created through a process of knowing, the importance of the situational and multifaceted character of meanings in research settings, and the holistic study of emergent processes in particular and changing contexts, are part of the constants that a contextualist researcher is likely to bring to the process of inquiry. In the writer's view, those elements of a contextualist's theory of method produce a process of inquiry and can lead to outcomes of inquiry which naturally provide opportunities for marrying theory and practice. I will return to develop that point at the end of the paper, but in the meantime there is more to be said about the ontological and epistemological bases of contextualism, and how contextualism equates with and differs from the other world hypotheses propounded by the philosopher Stephen Pepper (1942, 1966) and the useful interpretation of Pepper's ideas by Payne (1975, 1982).

Contextualism and Other World Hypotheses

In his book *World Hypotheses*, Pepper (1942) distinguishes amongst the various kinds of evidence about the world which can be used to corroborate claims to knowledge. Two broad types are mentioned; multiplicative corroborations and structural corroborations. Multiplicative corroboration validates claims to additional knowledge about empirical or logical facts through procedures which end up with men and women arguing and agreeing that such and such is the case, for example, that water boils at 100°C. Clearly this process as required by positivists necessitates agreement on a definition of what is being measured empirically, agreement on the form and nature of the measuring instrument, and similar scores made over many different observations.

Notwithstanding the claims of positivists, Pepper (1942) argues there are other ways to refine cognitions about the world other than through multiplicative corroboration. In many fields of knowledge outside certain areas of physics and chemistry, data are often “rough,” relying ultimately upon common-sense; in addition, at the end of a complex argument, Pepper argues that a person wishing to propose that data are the only reliable form of knowledge must have a hypothesis as to why this position is held. “The grounds for any such argument could not be based on data, but only on some hypothesis about the structure of the world. Thus we arrive at structural corroboration and world hypotheses” (Payne 1982, p. 14).

Within his category of structural corroboration, Pepper describes four world hypotheses and how they may influence attempts to corroborate claims to knowledge. None of these four world hypotheses are deemed superior to the others, all are regarded as relatively adequate because each has some weakness. Pepper explores the origins of each world hypothesis, arguing that each has its own root metaphor, and in turn its own truth theory. Thus the four world hypotheses are formism, mechanism, contextualism, and organicism. *Formism* is concerned with classifications, the classifying of similar objects and phenomena into categories or types; the appropriate truth theory is correspondence, i.e., things are truer as a result of the degree of similarity which a description has to its object of reference, and the root metaphor is therefore similarity. *Mechanism* is concerned with law-like relationships between classes of phenomena which are divided and linked together according to machine-like principles. Thus the truth theory of mechanism is cause and effect, and the root metaphor is the machine. Truth derives from observations of whether the machine works, and whether one’s knowledge allows one to predict the outcomes of any casual adjustments made in the system. *Contextualism* is concerned with the event in its setting; the truth theory has to be qualitative confirmation since the context will change and knowledge will need to change also, and the root metaphor is the historic event. The final world hypothesis mentioned in Pepper’s book is *organicism*; it too is concerned with understanding the historical event, but it differs from contextualism in that time is unimportant. Organicism is preoccupied with enduring patterns of events, irrespective of time and place; the relevant truth theory is coherence of conceptual structures—truth is a product of magnitude of fact, and the root metaphor is harmonious unity.

In two very useful papers, Payne (1975, 1982) chronicles and interprets Pepper’s work in greater depth than there is space to do here, he then uses the four world hypotheses listed above, plus a fifth hypothesis—selectivism, that Pepper developed in

a 1966 book—in order to categorize examples of research in organizational psychology which have arisen implicitly, from pursuing often imperfectly, the range of world hypotheses listed by Pepper. Payne makes a number of broad points relevant to particular and general themes in this paper. He doubted how many people were aware of the epistemological underpinnings to their ventures, and therefore what they were selecting into or out of in tramping along their implicitly chosen road. Payne argues that the least activity has occurred in contextualism, and the most under the formistic and mechanistic traditions.

Personnel selection and the leadership style literature, Payne notes, contain two of the largest bodies of empirical data in organizational psychology and neither has succeeded in maintaining significant empirical or theoretical progress. Both are formistic in the sense that they have tried to compare people and situations and match one to the other to see which forms are congruent. In the Aston studies, Pugh and Hickson (1976) tried to create ways of typing organizations and then relating them to their contexts. Payne uses Starbuck's (1980) criticisms of the Aston studies to say how little new about organizations and their functioning was revealed by the Aston studies.

Using the example of behavior modification, in much of experimental psychology, ergonomics, and scientific management, Payne argues that the dominating metaphor in organizational psychology has been mechanism. Not surprisingly, Payne notes the machine metaphor

has been most successful where man is used as if he were a machine, but once one moves to situations where persons interact to achieve something, or where the environment allows the human freedom to select what he will do to satisfy his needs, the machine metaphor has broken down (Payne 1982, p. 22).

With the benefit of Pepper's (1942, 1966), ideas Payne has not only clarified the epistemological base of contextualism, he has also exposed some of the strengths and weaknesses of the various world hypotheses, and which have implicitly or explicitly been put to use with what effect in organizational psychology. Payne also nails his own colors to the mast in arguing for a greater use of contextualist approaches in organizational psychology; we will now have to see whether his espoused theory becomes his theory in use while conducting his own research in future. This after all is the problem, valuable as the classificatory theoretical and epistemological maps of Burrell and Morgan (1979) and Payne (1975, 1982) are, the real task is to go beyond espoused classificatory systems and begin to disentangle, for example, what greater use of the contextualist approach might contribute to theoretical and practical developments in a chosen research area, and what does contextualism actually mean in the conduct of professional behavior in a research setting. In the two sections which follow, I try to pick up those points, firstly by arguing for the benefits of contextualism in research on the topic of organizational change, and then by attempting to specify further elements of contextualism as a mode of analysis in the practice of research.

Contextualism and the Study of Organizational Change

Discussions about the relative advantages of different research methods cannot be sensibly conducted, as Pepper's (1942) work implies, without reflecting on the epistemological base and assumptions of the varying approaches. Likewise debates about method cannot be usefully informed without examining the relationship between the chosen method and the chosen research topic, and indeed the way different methods open up and constrain opportunities for certain kinds of theoretical, empirical, and practice-focused developments. Nowhere in the study of organizations is it clearer the extent to which empirical, theoretical, and practical developments have been bounded by prevailing orthodoxies about method as in the study of organizational change.

In a broad review of the literature on organization change and development made elsewhere (Pettigrew 1985), the following points essential to the present argument are made:

1. The organization development (OD) literature (e.g., Bennis 1969; Beckhard 1969; French and Bell 1973) has emerged as a rather precious subculture of theory and practice which has not connected itself well either with existing work or novel theoretical developments going on in organization theory or behavior, or with advances in thinking about change conducted by sociologists and anthropologists (Zald and McCarthy 1979; Geertz 1973).
2. Research on OD has been limited by the autobiographical and single case study character of that research (e.g., Klein 1976; Warmington et al. 1977).
3. Research in the broader, more inclusive field of organization change has been weakened by the limited frames of reference and methodologies used to study change. With a few limited but noteworthy exceptions (e.g., Kervasdoue and Kimberly 1979; Berg 1979), much of the research on organization change is ahistorical, aprocessual, and acontextual in character. In this respect, the area of organizational change and development is merely reflecting the biases inherent in the social sciences generally, and in the study of organizations in particular. A consequence is that the field of organizational change and development is characterized by limited attempts at theoretical development, few theoretical debates, and very limited empirical findings. There are remarkably few studies of change which actually allow the change process to reveal itself in any kind of substantially temporal or contextual manner. Studies of innovations are, therefore, often preoccupied with the intricacies of particular changes, rather than the dynamics of changing.
4. Picking up the a historical and a processual form of much research on organization change, there are theoretical limitations which derive from treating the change project as the unit of analysis. Change in this mode of analysis is regarded either as a single event, or a set of discrete episodes somehow or other separate from the immediate and more distant antecedents which give those events form, meaning, and substance. Such episodic, or project and program, views of change not only treat innovations as if they had a clear beginning and a clear end, but also where they limit themselves to "snap shot" time series data, fail to provide data on the mechanisms

and processes through which changes are created (e.g., Bowers 1973; Franklin 1976).

The point being made here, of course, is that the research findings on change are method bound. Time itself sets a frame of reference for what changes are seen and how those changes are explained. The more we look at present day events, the easier it is to identify change; the longer we stay with an emergent process and the further back we go to disentangle its origins, the more likely we are to identify continuities. Where we sit not only influences where we stand, but also what we see. Without longitudinal data, it is impossible to identify the processual dynamics of changing, the relationship between forces of continuity and change, and therefore the inextricable link between structure and process.

5. But research on change has not only been limited theoretically and empirically by its ahistorical and aprocessual character, there are also the restrictions emanating from the acontextual nature of research on organizational change.

If studies of change, which do not incorporate antecedent factors and conditions, and processual dynamics are limited enough, further problems arise when processes are not analyzed in their present day and emerging contexts. Although studies of, for example, job design changes have often been criticized (Daniel and McIntosh 1972; Pettigrew 1976) for ignoring the varying contexts in which such changes have been introduced, there is a growing recognition (Mohrman et al. 1977; Lewicki 1977; Elden 1978) of the role of contextual variables in influencing the content and pace of organizational change.

There are a number of important considerations in delineating and using contextual variables in any analysis of organizational change. One factor which distinguishes the work of, for example, Mohrman et al. (1977), Lewicki (1977), Elden (1978), and Kervasdoue and Kimberly (1979) is how they define context. Of these authors, the first two define context exclusively in terms of intraorganization context, or in terms of a combination of that and some notion of organization environment. Meanwhile Elden (1978) and Kervasdoue and Kimberly (1979), with varying degrees of specificity, draw on intraorganizational, organization environmental, and socio-economic contextual variables.

In a recent book, Pettigrew (1985a) demonstrates how long-term processes of continuity and change can be profitably analyzed in a contextualist analysis drawing on features of intraorganizational (inner-context) and socio-economic and political (outer-context) levels of analysis.

6. Aside from the theoretical and empirical limitations imposed on the analysis of organization change by research which is predominantly ahistorical, aprocessual, and acontextual, two other points are worthy of note about existing theorizing on change processes. The first issue relates to the theoretical and practical inadequacies of the highly rational and linear theories of process which drive much of the literature on innovation and planned organization change. These planned theories, many of them with highly prescriptive and deterministic phases or stages (Lippitt et al. 1958; French and Bell 1973; Zaltman et al. 1973), are both inadequate ways of theorizing about what actually happens during change processes, and overtly simple guides for action. The field of organizational change badly needs theoretical development along the lines of the literature on organizational decision making where there are now a

variety of process models of choice ranging from satisfying views of process (March and Simon 1958); political views of process (Pettigrew 1973a); and garbage can view of process (March and Olsen 1976).

If the language of process in planned theories of change is singularly rationalistic, one of the problems about the more general study of change is the proliferation of metaphors and images trying to capture in a phrase broad processes of development. Each of these phrases is pregnant with its own world view, model of man, and explanatory language. How are we to choose between growth and development, continuity and flow, life cycle and phase, contradiction, intrusion, and crisis?

What is analytically clear from this brief look at the biases of method and theory in the literature on organizational change, and indeed from Schon's advice that in our reflective understanding of situations, we should leave ourselves open to "back-talk," is beware of the singular theory of process, and therefore of social and organizational change. Look for continuity and change, patterns and idiosyncracies, the actions of individuals and groups, and processes of structuring. Give history and social processes the chance to reveal their untidiness. To understand organizational change examine the juxtaposition of the rational and the political, the quest for efficiency and power, the enabling and constraining forces of intra-organizational and socio-economic and political context, and explore some of the conditions in which mixtures of these occur.

The logic of the above points about theory and method indicate that the study of organization change is now at the stage where theory and knowledge is required principally to understand the dynamics of changing in alternative contexts, using a framework of analysis which can incorporate different levels of analysis with varying degrees of explanatory immediacy and distance from the change process under examination. In order to do this, the field has to move beyond the useful but mechanical statements of contingency theory which emphasize the inter-connections between a state of the environment and certain requirements for structure, behavior, or change, and begin to examine how and why changes occur in different organizational cultures and political systems, under different socio-economic conditions, through time.

Such an analysis recognizes that theoretically sound and practically useful research on organizational change should involve the continuous interplay between ideas about the *context* of change, the *process* of change, and the *content* of change, together with skills in regulating the relations between the three. It will require frames of reference and methods of data collection sensitive to alternative antecedent conditions, variety of receiving culture for the change, alternative levels of analysis and explanation, differing change strategies, and alternative change outcomes. Above all, it will require time series, processual data in order to see how and why the above broad analytical factors work themselves through any particular sequence of events and actions.

Contextualism as a Mode of Analysis

So far in this paper, a number of broad statements have been made both about the epistemological base of contextualism and the practical process implications of using contextualism as a form of inquiry. Philosophically, contextualism has its roots in the pragmatism of William James and C. S. Pierce, has its focus on the event in its setting,

and relies on a truth theory of qualitative confirmation or falsification. In practical process terms, its constants, as seen by this author, imply a mutual form of inquiry, the balancing of involvement and distance, the importance of the situational and multifaceted character of meanings in research settings, and the holistic study of emergent processes in particular and changing contexts.

I wish now to go beyond these broad statements, and to try and sketch out in more detail what contextualism as a mode of analysis is, and indeed how the principles so described can be translated into a series of practical components to inform data collection and analysis in any particular study. I offer this glimpse of my own theory of method as a modest attempt to sketch out *a* way of thinking about doing contextualist research in the hope that others can be encouraged to do the same. Presented here it may appear as an intendedly rational strategy conceived before action, but in fact much of what follows has been distilled after the fact from conducting a series of research projects on decision making processes (Pettigrew 1973a; Mumford and Pettigrew 1975), occupational specialization as an emergent process (Pettigrew 1973b, 1975), the creation of organizational cultures (Pettigrew 1979), and long term processes of strategic decision making and change (Pettigrew 1985a, 1985b). What follows should be treated as inarticulate reflection from practice, an idealized view never to be completely realized and certainly to be tuned according to the vagaries and surprises of different contexts.

In fact, my own understanding of contextualism in use has developed with the experience gained in the above research projects, and since the view about to be reported comes from a comparative and longitudinal study of strategic decision making and change in Imperial Chemical Industries PLC (ICI), it may be helpful to briefly describe the core questions of that study before launching into an account of contextualism as a mode of analysis. The ICI study is reported in Pettigrew (1985a, 1985b).

ICI is one of Britain's largest manufacturing firms and in 1981 ranked the fifth largest of the world's chemical companies in terms of sales in U.S. dollars after DuPont and the big German three—Hoechst, Bayer, and BASF. The research examines ICI's attempt to change their strategy, structure, technology, organizational culture, and the quality of union management relationships over the period 1960-1983. An important and unusual feature of the research strategy has been the collection of comparative and longitudinal data. Interviews, documentary, and observational data are available from four divisions and the Head Office of the company. These data have been assembled on a continuous real time basis since 1976, and through retrospective analysis of the period 1960-1975. Some of the research findings have formally been fed back into the company, and I have acted as a consultant to ICI over much of the period since 1976.

The study explores two linked continuous processes. The initial focus of the research was to examine the birth, evolution, demise, and development of the groups of internal and external organization development consultants employed by ICI in order to help initiate and implement organization change. This analysis of the contributions and limitations of specialist led attempts to create change, has led to the examination of broader processes of continuity and change in ICI as seen through the eyes and activities of the Main Board and Chief Executives of the company, as well as the boards of ICI's four largest divisions: Agricultural, Mond, Petrochemicals, and Plastics. The 20 plus years time frame of the study, plus the author's closeness to people and events in the company, has allowed the above processes to be studied both in relation to changes in intra-organizational context, and social, economic, and political context.

A contextualist analysis of a process such as strategic decision making and change draws on phenomena at vertical and horizontal levels of analysis, and the interconnections between those levels through time. The vertical level refers to the interdependencies between higher or lower levels of analysis upon phenomena to be explained at some further level, for example, the impact of a changing socio-economic context on features of intraorganizational context and interest group behavior. The horizontal level refers to the sequential interconnectedness between phenomena in historical, present, and future time. An approach which offers both multi-level or vertical analysis, and processual or horizontal analysis, is said to be contextualist in character. Any wholly contextualist analysis would require the following prerequisites.

1. A clearly delineated, but theoretically and empirically connectable set of levels of analysis. Within each level of analysis and, of course, depending on the focus of explanation, there would be specified a set of categories.
2. A clear description of the process or processes under examination. Basic to the notion of a processual analysis is that an organization or any other social system may profitably be explored as a continuing system, with a past, a present, and a future. Sound theory must, therefore, take into account the history and future of a system and relate them to the present. The process itself is seen as a continuous, interdependent, sequence of actions and events which is being used to explain the origins, continuance, and outcome of some phenomena. At the level of the actor, the language of process is most obviously characterized in terms of the verb forms, interacting, acting, reacting, responding and adapting; while at the system level, the interest is in emerging, elaborating, mobilizing, continuing, changing, dissolving, and transforming. The focus is on the language systems of becoming rather than being; of actors and systems in motion.

Any processual analysis of this form requires as a preliminary the set of categories identified in point (1) above. Change processes can only be identified and studied against a background of structure or relative constancy. Figure needs ground.

3. The processual analysis requires a motor, or theory, or theories, to drive the process, part of which will require the specification of the model of man underlying the research. Within this research on change, strong emphasis is given both to man's capacity and desire to adjust social conditions to meet his ends, and the part played by power relationships in the emergence and ongoing development of the processes being examined.
4. Crucial, however, to this whole approach to contextualist analysis is the way the contextual variables and categories in the vertical analysis are linked to the processes under observation in the horizontal analysis. The view taken here is that it is not sufficient to treat context either just as descriptive background, or as an eclectic list of antecedents which somehow shape the process. Neither, of course, given the dangers of simple determinism, should structure or context be seen as just constraining process. Rather this approach recognizes that processes are both constrained by structures and shape structures, either in the direction of preserving them or altering them. In the past, structural analyses emphasizing abstract dimensions and contextual constraints have been regarded as incompatible with processual analyses stressing action and strategic conduct. Here an attempt is being made to combine these two forms of description and analysis. First of all, by

conceptualizing structure and context not just as a barrier to action but as essentially involved in its production (Giddens 1979; Ranson et al. 1980), and second, by demonstrating how aspects of structure and context are mobilized or activated by actors and groups as they seek to obtain outcomes important to them.

In this analytical approach to understand the origins, development, and implementation of organizational change, the interest, therefore, is in multilevel theory construction. An attempt is made to formulate models of higher-level factors and processes, lower-level factors and processes, and the manner in which they interact. It is recognized that each level often has its own properties, processes, and relationships—its own momentum—and that while phenomena at one level are not reducible to or cannot be inferred from those at another level, a key to the analysis is tracking the interactions between levels through time.

The above represent some broad principles informing a contextualist analysis of process. But how might those principles be translated into a series of practical components to inform data collection and analysis in any particular study? Figure 1 lays out in highly simplified diagrammatic form a possible series of interlinked components in a contextualist analysis.

Figure 1 indicates there are three basic elements to a contextualist analysis: the process component, the context component, and the outcome component of the process under investigation. In terms of the practical research questions of gathering data, and sorting that data into broad categories for analysis, the basic steps may be described as follows:

1. Describe the process or processes under investigation, which, for example, may be processes of conflict, decision making, or changing. An important pragmatic question here is to be clear about when and why the process under investigation begins and ends. At what time point do you begin and end your investigation?
2. Expose in the above descriptions any variability or constancy between the processes. This variability is, of course, represented in Figure 1 by the different curved lines.
3. Begin the analysis of the above processes by using existing or developing novel theories of process.
4. Begin the task of pinpointing the levels of analysis in the context, and some of the categories or variables in those different levels of analysis. Are, for example, the levels in the context to be restricted to features of the intraorganization context through which the processes immediately flow, or is the analysis to include aspects of the outer context such as the social and economic conditions surrounding the organization at any point in time?
5. Having established the levels of analysis and categories in the context, begin the task of describing and analyzing any variability across the contexts through which the processes are unfolding. Seek also to describe and analyze trends and developments in the various contexts through time.
6. Begin to consider the alternative criteria which can be used to judge the outcome of the process under study. This is a difficult practical research problem. Good sources to assist reflection on this problem are contained in the literature seeking to assess the success and failure, and other outcomes of social movement organizations (Goldstone 1980; Gamson 1980).

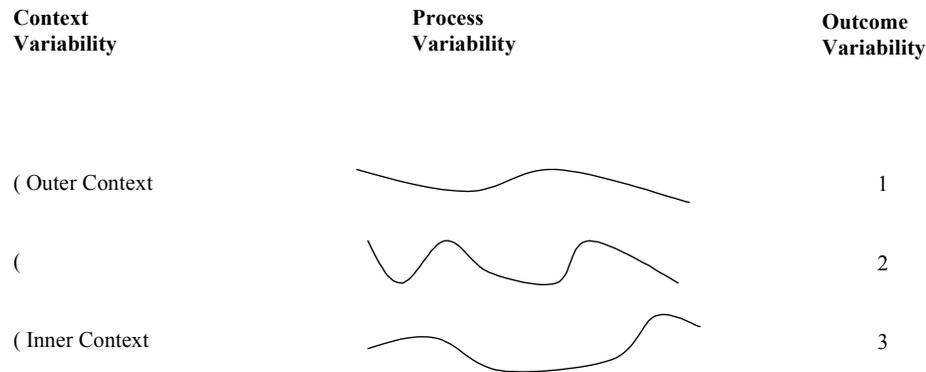


Figure 1. Components of Analysis: Context and Process

Important as the uncovering of the above components are to the success of the contextualist analysis, the key to the analysis lies in positing and establishing relationships between context, process, and outcome. In short, what are the relationships, if any, between variability in context, variability in process, and variability in outcome? It is in the craft skills in unraveling and establishing relationships between those three components of the analysis that the major benefits and principle problems of this kind of contextualist mode of analysis lie.

Contextualist Research: A Natural Way to Link Theory and Practice

As Spencer and Dale (1979) remind us, one of the frequent objections to case study research as a form of contextualist inquiry is that even if case studies can provide internally coherent and plausible explanations for individual cases, generalizations cannot be made and, therefore, there is only minimal contribution to a body of knowledge. Such an objection, while plausible at one level of interpretation of generalization, may begin to fall apart when the meaning of to generalize is reassessed, and when outcomes of research other than mere generalization—however defined—are examined.

In comparative statistical studies, generalization is assumed to be possible as a result of the population membership of samples. However, as Fletcher (1974) has documented, such statistical studies often assign population membership without checking more than a few properties of that membership, so that selection of samples may be made according to dubious classifications and typologies. As a result of these procedures, generalizations are made that are simply nonsense.

Clearly case study approaches cannot offer generalize ability in the above statistical sense, but even single case studies are capable of developing and refining generalizable concepts and frames of reference. See, for example, Lipset et al. (1956), Pettigrew (1973a, 1979), and Berg (1979). In addition, where multiple case studies are used in the

manner suggested by the above description of contextualism as a mode of analysis, i.e., by seeking to relate variability in context to constancy in process or outcome, then generalizations in terms of propositions may follow. The implications of following the context, process, and outcome form of analysis, is, of course, to move beyond Pepper's (1942) pure treatment of contextualism in terms of analyzing wholes in context, and to begin to introduce formist and organicist assumptions by dividing the world into analytical categories and deriving generalizable propositions. However, this is all to the good for it reminds us that the practical application of principles always muddle up the elegant distinctions of philosophers and epistemologists.

But before I get carried away into projecting generalize ability as the sole outcome of research, it is important to counterbalance that with the contextualist's desire for descriptive understanding. Systematic description of the properties and patterned relationships of any process, and of the changes in context through which such processes emerge, and in turn influence that context, is a critical form of knowledge for theoretical development and, we shall shortly argue, for practice. In conducting such process in context research, it is critical for theoretical developments in organizational analysis that context is no longer defined just as intra-organizational context, or organization environment merely defined just in terms of the activities of other organizations. We have to bring socio-economic and political contextual factors into our analyses not only because they are in today's world so empirically crucial, but also because incorporating such a broad treatment of context into our analyses will release organizational analysis from much of the misdirected, and in many cases impotent, managerialism which informs the "theories" guiding management practice.

Irrespective of the pleas of any interest group for useful knowledge, it is important that historical research such as Ramsay's (1977), examining how cycles of management interest in worker participation correspond to periods when management authority is felt to be facing challenge, is placed alongside research such as Walton's (1980), which looks at the fact of individual participative projects irrespective of socio-economic and political context. The retort that it is pointless telling managers about socio-economic context because it is not a variable they can control, and therefore a lever they can pull, is clearly a nonsense statement given, for example, Miles' (1982) study of how the six big firms in the tobacco industry sought to defend their legitimacy against the anti smoking lobby in the United States. More generally, it is clear from my own studies (Pettigrew 1985a, 1985b) that managerial action is fundamentally located in differential perception and understanding of intra-organizational and socio-economic context, and that context is not just something that should be understood but often requires to be mobilized to create practical effects. An advisory group interested in creating change must itself create a social context in which it can survive and prosper. A chief executive creating strategic change has to recognize that a key element of the politics of organizational change relates to how the context of strategy can be mobilized to legitimate the content and process of any strategic adjustment. He who understand the political and cultural system of his organization, and the impact of changing economic and social trends on the emergence and dissolution of old issues, values, and priorities, and the rise of new rationalities and priorities, is at least beyond the starting gate in formulating, packaging, and influencing the direction of organizational change.

The above points illustrate how questions of levels of analysis, the vertical component of contextualism, can influence the kinds of theoretical questions posed, empirical generalizations made, and statements of practice possible. The same kind of logic can be applied to the horizontal component of contextualism, the concept of time incorporated into the analysis. Earlier in this paper it was argued that the prevailing orthodoxy in the study of organizational change was to treat the change project, episode, or program as the unit of analysis and thereby to detach the analysis of change from the context which provided form, meaning, and substance to that change episode. This episodic view of change might not only lead to some thoroughly misleading statements about the success or otherwise of any change project, but also tends to encourage the problem of managing or diffusing particular innovations to be stated in terms of how can this change project or proposal be foisted on this system with minimal resistance or maximal support? This kind of honest but theoretically misdirected managerialism has, of course, bred a massive response in the literature on resistance to change, of which some of my own writing may be considered a part. However, a methodological approach which encourages theoretical and empirical developments about long term processes of continuity and changing, and in particular which addresses questions about the deep seated organizational cultural roots of power systems, and the strategies emanating from them, leads us prescriptively to consider managing change processes in terms of keying into the natural processes of inertia and change going on in an organization and its context. The practice question is thereby posed less in terms of how can this change project proposal through whatever form of political agility or “authentic” process be foisted on this system, and more in terms of how can existing processes be speeded up, the conditions that determine people’s interpretations of situations be altered, contexts mobilized to achieve practical effects, along the way to move the organization, perhaps additively, in a different direction?

The above discussion of how contextualism as an approach to inquiry can influence the asking and answering of questions of theory and practice should not distract me from the essential summary point I wished to make in this paper about the analytical approach and process of conducting contextualist research providing a natural opportunity to develop theoretically and practically useful research. I use the word natural in this context to symbolize what I see as great similarities between the process of inquiry and action of managers as described by Schon and what has been described here as contextualist research. Schon (1983, p. 265) argues:

Managers engage in reflective conversations with their situation. The reflection-in-action of managers is distinctive, in that they operate in an organizational context and deal with organizational phenomena...when practicing managers display artistry, they reveal their capacity to construct models of unique and changing situations, to design and execute on-the-spot experiments. They also reveal a capacity to reflect on the meanings of situations and the goals of action.

If that is what managers do, then it should be clear from this paper that is what contextualists inquire into and do. The manager and the contextualist both see the world of practice in terms of uncertainty, complexity, instability, uniqueness, and value conflict.

Both may be interested in the multiple meaning of events, the placement of acts in contexts, the recognition that situations of practice can be unique and that practice has to do with finding problems through detailed immersion in contexts, as well as solving problems so found. Both are very wary of standard theories or techniques applied without reference to time or place, look for pattern and idiosyncrasy, wish to balance distance and involvement in inquiry, and above all are interested not just in accurate description of what is happening, but the mechanisms which provide opportunities and constraints for making things happen.

Some Criteria for Evaluating Contextualist Research

A fair question to ask any scholar associated with a particular mode of inquiry, whether it be quantitative, qualitative, or whatever, is how do you tell a good piece of work from a less than satisfactory piece? In relation to the present attempt to describe the form and potential of contextualist modes of inquiry, the pertinent question therefore to ask is how do you distinguish between good and not so good contextualist research? The views I have on this question are based on some of the principles of theory of method outlined in this paper and the craft research problems raised by attempting to put that theory into use. I would start with a series of research goals:

1. Precision of measurement
2. Generality over actors
3. Realism of context
4. Theoretical and conceptual development
5. Contribution to particular and general questions or policy and practice

The assumption of this paper is that those scholars conducting contextualist research give primacy to realism of context and theoretical and conceptual development as research goals, and by the very nature of the research process they engage in and the kinds of data they are likely to collect, thereby create some of the circumstances to ask and answer questions of policy and practice. Given that the contextualist explicitly works towards goals three, four, and five, then research of a contextualist character should be evaluated principally around those three criteria. The emphasis given to goals three, four and five does not, of course, preclude the use of measurement, indeed the generation of apposite measures, that is measures invented and sensitively linked to the subtleties and nuances of a particular context or contexts, is an important consideration for the style of research described here. Equally well the exploration of processes in context does not have to imply single case study analyses, although such case studies can be valuable as part of the task of raising new empirical areas for study and articulating novel frames of reference. Where comparisons are being built into the research design, these can involve multiple cases in different settings or multiple incidents in the same physical setting but at different points in chronological time, or different stages or phases in a group or any other system's pattern of development. Where comparisons are being attempted, a prime analytical requirement should be to demonstrate how variability in context influences the shape, pace, and direction of the social processes under investigation.

But moving away from these broad goals and considerations, what more particular criteria might be brought into play to distinguish good from not so good contextualist research?

1. Overall, the article, or more likely in the case of contextualist work the book, should attain some balance between description and analysis. The role of description is to

clarify and establish the context, structure, and process to be explained. In Pepper's (1942) terms, the event should be adequately described in its context—the stream adequately portrayed running through its terrain.

But what is adequate? When does the contextualist researcher stop collecting data? Do you desist peeling layers off the onion only when you or the onion becomes weary, or your eyes begin to weep? Pepper (1942) tells us, of course, it is a question of qualitative judgment and qualitative confirmation, but that's not very helpful in a particular research setting. Clearly the contextualist researcher has to satisfy himself, his respondents, and his potential critics that his analysis of the process in question has something more than an arbitrary beginning and a perfunctory end. There must be an empirical and a theoretical justification for both the chosen time frame of the study—the horizontal component of contextualism—and the vertical component, the decisions made to restrict the levels of analysis to the group, the organization, or the social, economic, and political context through which the process makes its way.

Another way of approaching the problem of adequateness of description relates to the issues of adequateness of data sources. Was the description of the process based only on interviews with, for example, the OD consultants, or was data collected from both internal and external OD consultants, and from their doubters, supporters, and opponents from various levels of management, and if appropriate from employee representatives? If multiple data sources were used, have multiple interpretations of events been revealed, and if the researcher has chosen a particular frame of reference to explain the direction and pace of the process, have competing theoretical interpretations been posed or in any sense disconfirmed by further attempts at data collection and analysis? Equally well, was the interview data cross checked by archival analysis?

2. These points about interpretation of the descriptive chronology are a reminder that in many studies description is not enough as an accomplishment. There are, of course, still many areas of life and organizational endeavor where purely ethnographic studies are to be welcomed. Description on its own unencumbered by theoretical and conceptual elaboration may of itself be justified when the setting or process under observation is of some significant organizational, social, or practical value, or is in some way novel or interesting to professional or practitioner communities. Examples of themes and topic areas in the study of organizations where, at this stage in the development of knowledge even purely descriptive work would be valuable include accounts of well screened and inaccessible phenomena such as the process of decision making and policy making at the board level, and the formulation and implementation of strategic changes.

Even allowing for occasions when rich descriptions of normally sheltered organizational processes are worthwhile, a further criterion of evaluation for contextualist work should be the extent to which the descriptive chronology of the process is in turn being interpreted by theoretical themes, and/or being used to derive theoretical ideas and concepts. These theoretical themes and concepts represent, of course, an attempt at generalizability—at placing the work within a wider scheme of things theoretically and conceptually, in a situation where a limited number of cases clearly restricts external validity.

3. Does the contextualist writer also use the descriptive context, the chronology, and concepts to provide a processual analysis? Are the phenomena under investigation revealed at the what level, the why level, and the how level? Are the social

mechanisms operating to guide, develop, and alter the processes under analysis clearly specified and empirically established?

4. Finally, as in most areas of social science endeavor, how adequately are the theoretical ideas and concepts in the writing connected back to the data?

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