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PART III: Methodological Approaches

Introduction: How Diverse Methodologies Inform Understandings of Work and Family Relations

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Disciplinary traditions vary not only in their perspectives on the connections between work and family, as amply demonstrated in Section II of this volume, but also in the approaches or methods used to understand phenomena. The chapters that follow in Section III have been selected to enable readers to gain an appreciation of the diversity of methodologies being applied to the study workplace and family relationships. In order for epistemologies to be shared, not only do basic assumptions and fundamental views need to be bridged, but also approaches to and ways of knowing. When we looked at the existing books on work and family, we saw a critical gap—there is a lack of discussion of the breadth of methods, the varieties of technologies, and the range of sampling strategies being used by the different discipilines. Bridging these divides opens a horizon of new opportunities in the work and family field.

It was clear to us that the disciplinary perspectives of the scholars influenced their selection of the preferred unit of study. These can range from individuals, couples, work groups, organizations, communities, legal structures, and other structural and cultural arrangements. We also saw conventional differences in what was measured and not measured. Sometimes the center of attention was on psychological dispositions, and at other times the focus for work and family researchers was on organizational-level decision making in response to strategic change, productivity outcomes, family relationship qualities, or time resources. To collect this information, a variety of strategies were used, including direct observation, participant–observer surveys, interviews, organizational records, and legal archives. In essence, because work and family is a multi-disciplinary endeavor, it is also necessarily a multi-methodological endeavor that requires adoption of a variety of approaches for the empirical study of workplace and family connections.

In developing this section, we asked authors to provide an overview of their customary methodologies and the types of knowledge they can reveal about working families, jobs, and employers. We asked them to bring us into their world of research and to highlight some of

the challenges they faced, as well as the strategies they used to overcome these concerns. We also asked them to reflect on the limitations of their methodologies as well as share advice for shaping future research agenda.

Social science is not particularly conducive to the application of rigorous scientific methods, in part due to the ethical considerations of studying people and the logistical challenges of cataloguing human experience, development, and organization. For work-family researchers the problems of finding and effectively applying the right methodology are particularly vexing, owing to the need of infiltrating and connecting the unique institutional arrangements of the workplace and family. As Lewis Coser (1974) argued, the family and the workplace share much in common as "greedy institutions." These institutions can require intense loyalty and demand much on the part of their members, not the least of which are heavy time and emotional commitments. Most importantly from a methodologist's perspective, as cultural institutions, the workplace and the family tend toward privacy rather than disclosure. Work-family researchers must convince families and organizational gatekeepers to permit members to take time from their busy schedules and open their lives and experiences for study.

Consider, for instance, the insights Charles Darrah offers in his overview of ethnographic methodology (chapter 17), the methodological approach favored by cultural anthropologists. Darrah demonstrates the challenges and rewards of creating rich, thick, in-depth descriptions of the contexts of work and family lives. For Darrah, ethnography is as much a goal as it is a methodology, because it is uniquely designed to provide measures of the subjective experiences and understandings of the worlds that engage working families. For work and family researchers, this involves time-intensive activities, such as shadowing working men and women in the home and workplace, and their travels between. By bringing us inside the life-worlds of 14 working families in Silicon Valley, Darrah demonstrates the limited ability of the commonly accepted metaphors of "balance" and "juggling" to accurately capture the objective and subjective realities of work and family life. Better, argues Darrah, is the notion of "busy-ness," a concept that highlights the fragmented demands and selves created by contemporary arrangements.

While Darrah's ethnographic approach emphasizes the use of shadowing techniques and the analysis of field notes, Elinor Ochs, Anthony Graesch, Angela Mittmann, Thomas Bradbury, and Rena Repetti approach ethnographic research with the use of video cameras and systematic tracking of family members within household space (chapter 18). Ochs and her team stress the importance of understanding the interpersonal dynamics within situational encounters that form social rituals that charge family cohesion, such as the moments when working men and women return home, as well as the interaction of families with the material objects that surround their lives. By tracking families within the home, videotaping their encounters, and studying their conversations, her team documents the extent to which family members contact one another as well as the terms and qualities of these interactions. In their studies, they find low occurrence of all family members congregating or participating in similar activities within the first few hours of returning home from work. Additionally, the sequencing of the mother's and father's returns from work influence the nature of encounters with children, with fathers on the whole arriving later and experiencing greater difficulty integrating themselves into family interactions established in their absence. This research highlights the challenges families face in forging cohesive bonds, which tend to be hampered by the scheduling demands associated with dual-earner lives.

As Darrah and Ochs and her colleagues note, the quantity and quality of observations can be remarkably impressive with the use of methods developed by anthropologists. However, an inherent limitation in ethnographic research, as applied to work and the family, is the small number of families that can be observed by any research team, which in turn influences

the prospects of generalizing findings to more diverse populations, or to make comparisons between distinct groups. In contrast, the capacity to generalize and make statistically significant comparisons is one of the strengths of survey research. In chapter 19, James Bond and Ellen Galinsky provide an overview of the substantial work that has been conducted by the Families and Work Institute using survey methods. By illustrating the types of surveys they (and others) have conducted and identifying some key findings emerging from those studies, Bond and Galinsky show how carefully worded questions, fielded to large samples of participants across major corporations, offer the opportunity to detail how work and family experiences, needs, and opinions vary. In a useful overview of the central concerns of survey methods, the authors offer a helpful guide through considerations of sampling strategies, designing, and successfully implementing survey instruments.

Generally, telephone surveys, such as those developed by Bond and Galinsky, are conducted as directed dialogues between the interviewers and individual participants. Alternate strategies of interviewing are equally valuable, such as in-depth face-to-face interviews. In chapter 20, Janet Smithson outlines yet another methodology, the use of focus groups and group interviews. The focus group usually comprises a homogenous assembly of 6 to 12 people who maintain shared interests, and is guided by a moderator. "Running" the conversation is actually a group activity, as the pursuit of related issues emerge as a result of collective discussion. There are considerable advantages to using discussion groups as the unit of analysis because it affords researchers the opportunity to examine how group members "co-construct" their knowledge and perspectives. For example, Smithson shows how a discussion of family leave policy quickly became redefined as "unfair" to people who do not have children. By posing issues and recording the emergent dialogue, the focus group method especially lends itself to understanding how people form their perspectives on work and family concerns and policy.

In the previous section on disciplinary perspectives, many authors advocated for studies conducted over time—through the course of the day, through the course of a life, or even across historical eras. Ann Crouter and Amy Pirretti (chapter 21) offer an overview of longitudinal research methodologies and demonstrate how they can be applied to work and family issues over the life course. By performing repeated measurements on the same individuals or groups over time, longitudinal research is one of the most productive means of testing hypotheses of cause and effect relationships. These repeated measurements (i.e., data of the same indicators assessed multiple times on the same subject) can occur in a variety of temporal patterns, such as changes that occur after a long interval of time has elapsed or changes that occur annually, weekly, daily, or in accordance with life stage (such as transitions into parenthood or retirement). Crouter and Pirretti accomplish two important tasks in their chapter. First, they show that longitudinal research, in accordance with a variety of temporal conditions, has been applied to the study of work and family. Second, they show how longitudinal findings substantiate causal effects that remain merely "associational" in cross-sectional data. Although many challenges are inherent to longitudinal methods (including concerns of participant attrition, monetary expense, and time demands), these authors offer a compelling argument for the expansion of longitudinal research efforts, as they are crucial to the advancement of life course, life span, and evaluation research.

In chapter 22 Barbara Schneider extends the concern of integrating a temporal dimension to work and family research, illustrating the unique and robust contributions of the experience sampling method (ESM). First developed in the 1970s, ESM studies time use with the assistance of beepers, personal digital assistants (PDAs), or programmable wristwatches that signal participants to record their primary and secondary activities, as well as their affect, at random or specified moments in the day and week. By charting these observations across time, Schneider documents the devotion of family members to different activities throughout the day, how they feel about those activities, stress issues that emerge, and the times in the day and

week at which family members' subjective experiences enhance or deteriorate. The potential of ESM to enhance understanding of family time use, applied through projects at the University of Chicago's Sloan Center's Study of Youth and Social Development, is now reaching fruition. One notable observation, for instance, is the trajectories the subjective experiences of husbands and wives take during transitions from work to home in the late afternoon and evening. This methodology complements, and in some respects improves on, the reliability concerns that are present in retrospective accounts of the use of time (such as those obtained in time diaries or surveys).

Most of the methods we have discussed thus far tend to focus on the personal aspects of work and family research. Other methods are uniquely designed to focus on characteristics and operations of the organizations in which working families are employed. In chapter 23, Suzan Lewis, Maria Das Dores Guerreiro, and Julia Brannen make a case for the case study method. They argue that an intensive analysis of a single company, workplace, or group of workers can reveal the workplace structures, practices, and cultures that limit (or potentially expand) opportunities to harmonize work and family responsibilities. Their descriptions of existing case studies reveal that these methods are best suited to describing *how* particular policies or cultures impact workers' lives, as well as generating understandings of *why* people behave in the manner that they do. In some respects, the case study (like ethnography) is better characterized as an "approach" than a specific methodology, as the types of data collected vary depending on both the research questions and the extent to which opportunities are afforded research teams. The authors highlight successful strategies of gaining access to organizations, selecting and interviewing key informants, and gauging formal and informal organizational hierarchies.

Susan Lambert extends this concern in chapter 24, discussing methods of obtaining and analyzing organizational documentation. Lambert makes a compelling argument that the types of data customarily collected by companies (such as absenteeism, promotion, employee turnover, performance reviews, family leave usage, sales figures, profit statements, etc.) are both underutilized and central to making the "business case" for work-family policy. She notes, however, that these data can be prone to concerns of limited validity, which is the degree to which researchers can be sure that they accurately measure what they purport to measure. They also can have uncertain reliability or contain systematic variation that results from inconsistent record-keeping practices. Despite these potential limitations, Lambert argues that they are generally more accurate than self-reports, which are the most commonly relied on indicators of employee productivity and work commitment.

Some of the challenges of using organizational documents involve gaining the trust of organizational gatekeepers (such as managers or owners), learning the types of data that are available, gauging the strengths and limitations of the information recorded, adjusting analytic strategies to accommodate those concerns, and harmonizing research questions with data availability. In a demonstration of its application, Lambert shows that existing data in a midsized manufacturing plant revealed that workers tend to reciprocate their appreciation for family-friendly policies with increased productivity. She also shows that organizational records can sometimes be used to distinguish employer *policy* (what is formally stated) from employer *practice* (what is actually implemented). Such is the case when a program or policy is on the books, but records show it seldom used or has little impact on the lives of employees.

As Lambert discusses, one of the challenges of using organizational records is in gaining access to these files. Anticipating this concern, some readers will be especially interested in chapter 25, wherein MaryAnne Hyland and Susan Jackson consider the types of outcomes that are of interest to owners and investors, customers, top management, employees, spouses and children, and communities. They argue that the availability of data and the unique interest of academic research should not be the sole driving force in determining research methodology. Instead, they argue for crafting research projects to correspond with the interests of other

stakeholders, which in turn will open doors with greater ease. A significant contribution of their chapter is a careful consideration of the varieties of data of interest to groups that have a vested concern in work-family issues. By summarizing key findings and approaches to gathering those data, they bring us closer to matching research activities and design to suit the interests of receptive audiences.

Among the most significant recent developments in social science research are advances in statistical techniques. As Raymond Swisher demonstrates in chapter 26, the application of hierarchical models holds great potential in connecting the experiences of individuals and couples to the companies and communities in which their lives are embedded. These multi-level models offer innovative ways of assessing person and environmental fits and mismatches. Although only of recent invention, multi-level applications are already present in many statistical programs and have been used by many of the authors in this handbook. We believe Swisher's assertion is correct – that the future of work-family research will necessarily involve greater attention to the dynamic interplay of the characteristics of individuals, families, and their environmental contexts. Although grasping hierarchical methodology can be challenging even for those with advanced statistical capabilities, Swisher offers one of the most accessible illustrations available, as well as applies it to work and family research.

Work and family research involves making connections between institutional arrangements, and therefore also requires the consideration of causal relationships. In chapter 27, Shelley MacDermid and Ashley Harvey consider the concept of work and family conflict and challenge the work and family community to consider the causal connections that are implied in its study. On the one hand, work and family conflict can be an outcome—the result of institutionalized practices that put work roles and family roles at odds with one another. Alternately, it can be viewed as a predictor of a variety of experiences (such as stress) or shape decisions (such as when to have a child). MacDermid and Harvey suggest that one important direction to pursue is to not only understand the predictions and outcomes, but also why some individuals fare better or worse in similar circumstances. They suggest that this may require pursuing the study of work and family conflict in the manner outlined by other methodologies outlined in this section, such as the need for longitudinal study and hierarchical analyses that link individuals with their environmental contexts.

The final chapter in this section, by Margaret Neal, Leslie Hammer, and David Morgan, ties together many of the methodologies discussed by other authors. Rather than focusing on a single methodology, these authors outline the strategies of applying multiple methodologies to the study of work and family. They suggest that some research projects will benefit immensely by combining quantitative (statistical) and qualitative (discursive) methods. One advantage of these methods, when applied to individuals and organizations, is that they can facilitate the creation of hierarchical analyses, such as those described by Swisher. These authors argue that mixed methodologies also offer the advantage of complementing and overcoming the inherent limitations of single method studies. For example, the integration of qualitative methods (such as the focus group method described by Smithson) offers the advantage of creating inductive insights, and these insights can then later be used in the development of quantitatively oriented instruments such as surveys (such as those described by Bond and Galinsky). The successful application of mixed methods can lead to the creation of convergent findings that bolster confidence in the conclusions generated by a single methodology, as well as create connections between discrete findings. Additionally, the careful consideration of multiple methods can enable researchers to close the holes of questions left unanswered by a single methodology. Neal, Hammer, and Morgan provide a significant contribution by identifying the logistical challenges in implementing mixed methodologies (including staffing, time, expense, and coordinating activities), as well as highlighting the empirically driven concerns of methodology selection, sequencing of activities, and weighting study components in a multi-methodological design.

We hope readers find these chapters of value to their research activities. We believe that no single methodology or combination of methodologies is inherently superior. Our hope is that this presentation of the current diversity of methodologies being applied to the study of work and family will further stimulate the integration and cross-fertilization of approaches developed by the different disciplines. By bridging methodological divides and integrating findings, not only can we triangulate the state of the knowledge of working families and their employers (from their successes to failures, their needs to their resources), but also better fine-tune our instruments, approaches, and analytic techniques to answer the emerging questions in the challenging field that attempts to connect the workplace to the family.

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