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# A Qualitative Case Study approach to understanding Third Sector Managers' Career Orientations

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## Abstract

*The purpose of this paper is to set out how the career orientations and preferred career paths of Third sector managers in the UK were examined using a qualitative approach.*

*Through a case study of individual managers' working in the Third sector, this study examines the relationship between the identified career orientations of managers and their preferred career path.*

*It explains the data collection methods and how attention was given to the relevant ethical issues during data collection. Also it presents how data were transcribed and processed for analysis.*

**Keywords:** careers, case study, interpretative, managers, Third sector, qualitative research

## Research context

The aim of this paper is to examine the philosophical and methodological approach employed to investigate the career orientations and preferred career path of the Third sector managers in the U.K.

The career orientations of an individual are defined as "a central component of the self-concept that an employee is unwilling to relinquish, even if forced to make a different choice" (DeLong, 1982, p.22). An individual career orientation is important, because it refers to the constellation of self-perceived attitudes, values and needs that develops over time. It shapes, guides and influences the individual's selection of specific occupations, work settings and their career path (Schein, 1978, 1990). A career path is defined as a possible vertical and non-vertical career moves that an individual is willing to take in order to satisfy

their career orientation (Arthur, 1994, Erdogmus, 2004, Vos et al., 2008). The literature search for this study found no empirical research that seeks to understand the career orientations and the preferred career path of managers in the Third sector.

The substantial growth in the number of remunerated managers (often from a professional background) who have opted for a career in the sector; especially in small organisations (10 – 50 employees) in the last three decades (HM Treasury 2007, Cunningham and James, 2007, Smith, 2008, Moro and McKay, 2009). The literature also suggests that 24 per cent of managerial staff leave each year, signaling the need for small organisations in the sector to review managerial career orientations and preferred career path in order to develop appropriate and effective managerial career management strategies (Cunningham and James, 2007, Moxham and Broche, 2007, Matias-Reche et al., 2009).

The research questions posed by this study are as follows:

- To what extent do societal /organizational factors influence the Career orientations of Third sector managers’?
- What is the relationship between the Third sector managers’ career orientations and demographic factors such as age, gender, ethnicity, professionals and educational qualifications?
- What is the relationship between the Third sector managers’ career orientations and their preferred career path?

### **Structure of the paper**

The paper commences by discussing the research design and the philosophical perspective that guided the research strategy. Secondly, it describes in detail sources of collecting primary and secondary data and justifies the rationale for the methods of data collection employed. Thirdly, an account of the research sequence is given and this is followed by a detailed discussion of ethical issues related to the study and data analysis procedure.

## **Research Design**

Yin (1989) suggests that a research design is “the logical sequence that connects the empirical data to a study’s initial research questions and ultimately, to its conclusion” (p.28 – 29). Thus the main purpose of the research design is to assist in avoiding the situation in where the evidence collected throughout the research process, does not address the research questions. The formation of the research design in this study is guided by the research questions and the adopted philosophical approach (interpretivism). Also it was deemed necessary to delimit the study, in a number of ways so that its scope remains within its purpose and time limits. The study design process involved setting restrictions on a division of the Third sector (Drugs and Alcohol organisations) and the time period to be covered by the study.

## **Philosophical perspective**

Philosophical perspectives underwrite all research activities whether implicitly or explicitly. It informs our research choices, design and methodologies (Snape and Spencer, 2003; Bryman and Bell, 2007). According to Saunders et al., (2007) the research philosophy adopted, ‘contains important assumptions about the way in which you view the world’. The main influence is likely to be how the relationship is viewed between the knowledge and the process by which it is developed. Hammond et al; (1991) and Creswell, (2007) pointed out that there are two main components of a philosophical perspective epistemological and ontological considerations and their associated paradigms interpretivism and positivism. Positivism is based on two assumptions, first that reality is external and objective and second that knowledge is only significant if it is based on observation of this external reality (Easterby-Smith et al., 1992; Collis and Hussey, 2003; Bryman and Bell, 2007).

Interpretivism refers to the way in which individuals interpret their social world (Hughes, 1990; Saunders, et al, 2003; Bryman and Bell, 2007). Weber (2009) conceded that “the task of the social scientist is to understand events and explain them through the meanings that the individuals involved attach to their actions” (in Benton and Craib, 2001, p.80). This

implies that people's values and views differ and events are understood by different people differently, therefore, their perceptions are the realities that social science researchers should focus on.

This study is to understand the Third sector managers' perceptions of their career orientations and their preferred career path. Thus, the study focuses on ascertaining individual manager's views and perceptions of their career values, motives, interests and how societal/organisational factors have influenced their careers. The interpretivism approach has been considered to be appropriate for the study for the following reasons:

- It enabled the researcher to gain an understanding of managers' experiences and points of view about their career in the Third sector. In pursuit of answers to the interview questions, such as, what is your long term career goal? How does your present job fit in with your long term career goal? The researcher was drawing inferences from answers given by managers during interviews with the aim to produce managers' views of their career orientations and preferred career path.
- It allowed the researcher to gain an understanding of managers and HR managers differing interpretations of events (such as personal issues, individual career needs, organisational career management issues) and how these factors affect managerial career paths.
- This approach has been adopted by previous studies exploring the career orientations and career management of managers' in the private, public sector and the Third sector (Onyx and MaClean, 1996; Pemberton and Herriot, 1994; Petroni, 2000; Tocpler, 2003; Alatrasta and Arrowsmith, 2003; Suutari and Taka, 2004). These researchers stated that it enabled them to obtain in-depth individualised perspectives of the subject. Furthermore, Saunders et al., (2007) and Bryman and Bell (2007), suggest that the interpretivist philosophical perspective is appropriate when undertaking research in areas such as careers and career management.

However, the disadvantages of interpretivism are the reliance on subjective views and explanations of participants. In order to overcome these difficulties the researcher

implemented good practice in the design of the research instrument by linking the interview questions to the research questions. Also the researcher utilised multiple sources of evidence (documents, interview data, and field notes) in order to develop converging lines of inquiring, which is basically a process of triangulation.

### **The Research Strategy**

The research strategy for the study was informed by the purpose of this study, which emphasises an understanding of managers career orientations and preferred career path within the context of the Third sector. The intension was to understand how these managers' chose their career, the type of thinking and guiding steps they used and the manner in which they made their decisions.

Consideration about the level of knowledge that has been developed in the area of the research was also a contributory factor, in the decision to adopt a qualitative research strategy (case study). It was evident from the literature search (Cunningham and James, 2007; Smith, 2008; Moro and McKay, 2009) at the inception of the study that very little was known about the career orientations and the preferred career path of the Third sector managers'. This led to the conclusion that an empirical study using a case study strategy would be valuable in examining the career orientations of managers' in the Third sector. However, the problem may lie in observing processes and outcomes that occur across many cases and understanding the extent to which such processes are influenced by specific local contextual variations. However, the investigative approach offered by the case study strategy, facilitates an exposition of managerial career management processes in the Third sector and provides insights into how managers' career orientations influence their career path.

The case study's unique strength is in its ability to deal with a full variety of evidence (Stake, 1995; Rowley, 2002; Gomm et al., 2008). Eisenhardt (1989) and Yin (2009), assert that a case study strategy offers the use of different methods of data collection such as interviews observations and documentations provides the researcher with the opportunity to gain different perspectives from a range of sources and increases the likelihood of generating

theory. This supports one of the objectives of this study, the development of a theoretical model of the career orientations and preferred career path of managers working in the Third sector (Yin, 2009).

Yin (2009), points to the technically critical features of the case study strategy, stating that it is an empirical inquiry that:

“Investigates a contemporary phenomenon within its real-life context especially when...the boundaries between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used” (p.18).

This study employs the use of multi sources of evidence by collecting data from managers', HR managers' and organisational documents as a strategy for validating the research findings. Primary and secondary data sources were used to collect data in order to answer the research questions; this in turn facilitates the validation of the data.

Yin (2009) suggests that when designing a case study a choice needs to be made between conducting the study as a single case or a multiple case investigation (Stake, 1995; Rowley, 2002; Yin, 2009). Four types of case design were identified by Yin (2009) and described as follows:

Type 1: single case holistic design, is justifiable where the case represents a critical case and we want to use it for testing an existing theory. Other situations where a single case design is appropriate are longitudinal studies. The case serves a revelatory purpose.

Type 2: single case embedded design, requires one single case with multiple units of analysis. This design can be used when investigating a large health education programme that involves a number of funded projects. Each of the funded projects would then be the embedded units. These embedded units can be selected through sampling or cluster techniques.

Type 3: multiple case holistic designs, refers to the study of multiple cases, each constituting a unit of analysis. This is where no logical subunits can be identified or the relevant theory underlying the case study is itself of a holistic nature.

Type 4: multiple case embedded designs refer to the study, of more than one case, each case consisting of one unit of analysis (Yin, 2009). The choice of which design is most suitable for this study and the rationale behind the choice are discussed next.

Type 1 and Type 2 are not considered to be appropriate for this study, because this study does not fit into the definition of a “critical” case. The phenomenon being studied is not a unique one and could not give rise to the investigation of an extreme or unique case. Also this study is not considered a revelatory investigation.

Type 3 is also not considered appropriate, because employing a multiple holistic approach for this study will require the unit of analysis to include all aspects of the whole of each organisation’s functions, structures and activities. This study might run the risk of focusing more on organisational structures and processes rather than on individual managers as the unit of analysis of this study.

This study employed the embedded multi case study design (Type 4). The embedded multi case design allows the researcher to follow a ‘replication’ logic approach aimed at achieving analytical rather than statistical generalisations.

Yin (2009), suggests that the advantages of multi case study is that the analytic results concluded independently from two or three cases are more compelling than the results concluded from a single case. Confidence in the generalisability of the embedded multi case study findings increases with the number of cases included. Miles and Huberman (1985), observe that: “by comparing cases, one can establish the generality of a finding and at the same time, pin down the conditions under which that finding will occur. Therefore there is much potential for both greater explanatory power and greater generalisability” (p.151). Also confidence in the overall strength of the research findings has the ability to explain the causal links in real life interventions that are too complex for experimental approaches (Eisenhardt, 1989; Stake, 1995; Yin, 2009).

The embedded multi case design for this study has enabled the researcher to maintain a chain of evidence from the primary unit of analysis. Unit of analysis is defined by Sekaran (2000) as “the level of aggregation of the data collected during the subsequent data analysis stage” (p.135).

The unit analysis for this research is the 40 individual managers (working in 8 Drugs and Alcohol organisations) that have agreed to participate in this study. Each individual manager represents one case study in which convergent evidence is sought regarding the facts and conclusions for each case. The subunits are 8 HR managers working in the 8 organisations (mentioned above) who have provided us with an understanding of the NFP voluntary sector organisation’s approach to managerial career management and factors influencing managerial career management in the sector.

The conclusions from each case will be considered to be the information needing replication by other individual cases (Yin, 2009). Both the individual cases and multi-case results will form part of the research findings and the summary report.

### **Sources of data collection**

Data were collected from primary and secondary sources as part of the research design in order to obtain information which can answer the research questions and to test the conceptual framework. The primary data for the study were gathered through semi-structured interviews with managers and HR managers. The secondary data were derived (with the organisation’s permission) from documents such as organisational managerial recruitment policies, appraisal forms and career management policies.

### **Semi-structured interviews**

Schatzman and Strauss (1973) suggest that an interview is a special mode of inquiry which is particularly suited to the study of human beings and necessary where the actions of people are either unfamiliar or complex.

The managers' in this study were required to describe their career interest, needs and experiences which the literature search shows to be an under researched area (Parry et al., 2005; Moxham and Boaden, 2007). Therefore, it was considered that semi-structured interviews provided the best opportunity for in depth discussion to achieve a full understanding of the issues influencing the careers of Third managers' and to obtain answers to the research questions. Thus, the interview questions were designed to address each specific research question and to link what is asked at each individual interview to the overall research design.

Managers' were asked how factors such as government policies and organisational career management systems influence or constraint their careers. While interviews with HR managers were seeking to obtain information about, the Third sector organisation's career management policies and practices. Interview questions for HR managers include questions such as:

- Does your organisation have a career management policy for managers?
- What managerial career management systems exist within your organisation?
- What responsibility do you think the organisation have in supporting managers to manage their careers?

The semi-structured interview approach allowed for flexibility with a preference for posing questions, so that the interview is more like a conversation; whilst the focus was maintained on particular key issues of the research questions. The interview questions were designed to address specific research questions. This enabled the researcher to link what is asked in individual interviews to the overall research and enable the researcher to locate specific ideas and with specific participants supporting the aim of developing themes as they emerge.

Probes were used to clarify and to uncover answers, where participants are required to explain or build on their responses. This provided the researcher with rich data and information for interpretation and analyses (Bryman and Bell, 2007; Kvolve, 2007; Corbin and Strauss, 2008).

The researcher was able to ask follow-up questions such as; do you feel that your educational/professional qualifications have influenced your preferred career path? Has the training offered to you assisted you in your current job role or your long term career goal? The follow-up questions allowed the participants to elaborate the context of their answers, and enabled the researcher to explore the implications of what is said and to test and modify emerging themes (Bryman and Bell, 2007; Kvolve, 2007; Saunders et al, 2007). Every effort was made to test the reliability of evidence collected from participants, by seeking corroborative information from other sources, for example, organisational career management policies, appraisal forms and feedback forms from managers' training were collected and analysed. In the main, evidence collected from the participants constituted the major portion of data for analysis and interpretation in this study.

Interviews were recorded (with the permission of the participants) and notes were made at the interview by the researcher. After each interview a contact summary form was completed to summarise the main themes, concepts or issues arising from the interview. The use of the contact summary form allowed for adjustments to be made to the interview protocol, as new themes emerge from the interviews.

Despite the strengths of using semi-structured interviews to gather data there are weaknesses. Yin (2009), suggests that weaknesses of semi-structured interviews includes: response bias; bias due to poorly constructed questions; and inaccuracies due to poor recall. In order for the researcher to overcome these difficulties; the researcher made a conscious effort to avoid bias during the interview process by establishing rapport with the participants. The researcher started each interview with general (getting to know you) conversation, by explaining the purpose of the study and how it will benefit the individual and the voluntary sector as a whole. In an effort to minimise inaccuracies in the interview data; the interviews were recorded transcribed verbatim by the researcher. To validate the picture emerging during the interview; the researcher checked the transcripts and sent the transcription to the participants' and invited them to check the transcripts as an accurate representation of what was said at the interview; before commencing data analysis. Forty-

eight participants interviewed have returned their transcripts without making any amendments. Also the end of the interview each participants was asked if they were satisfied with how the interview had been conducted. Furthermore, an opportunity was given for participants to indicate any additional information they considered to be relevant.

### **Field notes**

The use of field notes added value to the data collected. The interviews were digitally recorded, non-verbal communications, such as body language and gestures could not be captured on the recordings. These observations were thus recorded in field notes. According to Patton (1990) field notes are an on-going, crucial part of the data that is being collected. In this study, they took the form of noting specific events during the interviews (participants nodding, telephone ringing, and participant filling papers during the interview) and notes about personal reactions and reflections. They also constituted of a written record of the development of the interviews.

The data collection from the field notes of this study included: a brief description of the physical setting where each interview took place; non verbal cues such as posture, facial expression, gestures, any type of behaviour or actions that might have affected the interview. Also any areas that needed clarifications later or cross checking with other participants were noted.

Fielding (1993) and Bryman and Bell (2007) suggest that feelings and reactions during fieldwork should be recorded at the time they are experienced. They also added that doing fieldwork does have emotional costs and one needs data on one's attitude in order to document and explain one's evolving relationship with others in the setting.

Also the field notes were a useful way of reflecting on each of the interviews and to reflect on the present meaning and significance of what had been discussed during the interviews.

## **Documentation**

Yin (2009) suggests that, except for studies of preliterate societies, documentary information is likely to be relevant to every research topic. The use of documents for this study is to corroborate and augment evidence from information gathered from interviews with managers and HR managers. An examination of documents (such as recruitment policies, managerial job advertisements, appraisal forms, career management policies and procedures) provided data that could not be observed and enabled the researcher to describe the context and conditions of how managers' were recruited and any managerial career benefits they were offered during the recruitment processes which had influenced their career path.

Organisational service specification documents were also examined as they contained information such as a description of services offered client group and the organisational ethos and philosophy. An examination of these documents was useful in the discussion of the reasons these managers' have chosen to further their career in a particular organisation within the sector. All documents were collected in their original forms with no modification whatsoever by the researcher.

## **Ethical Approach**

Ethical considerations in business research are paramount in order to avoid any risk to the physical, psychological, health and social well being of the participants (Saunders et al.; 2007).

Before starting the field work:

- I. All participants were informed in writing about the purpose of the study (weeks in advance), time, duration required for individuals to participate during the fieldwork period, who will see the interview data, the benefit of the study to the individuals and the Third sector.
- II. A signed informed consent form was obtained from each participants stating their willingness to participate in the study before the interview commenced.

- III. The promise of confidentiality of all information gathered was particularly stressed to each participant before the interview. To achieve confidentiality during the interviews, the interviews were conducted in a venue chosen by the participant (e.g. a café, gym rest room, a car park). Participants were also asked to state when and how they preferred to be contacted e.g. by personal email or work email.
- IV. Permission to digitally record all interviews had been sought and granted by all participants. All interviews have been transcribed by the researcher and it is electronically stored and password protected. Interview records are identified by a reference number are stored in a locked filing cabinet and after data analysis it will be shredded.

There are still issues concerning researcher interference on the study environment and subject under study (Sekaran, 2000). Participants who appeared to be apprehensive for example, in answering truthfully the limited career management offered in their organisation as criticisms of their employers were offered anonymity. Care was taken to ask questions in a neutral way (Moser and Kalton, 1971; Bryman and Bell, 2007) and in such a way that organisational practice was not being explicitly challenged.

It was reinforced on the outset of each interview that the interview was purely to ascertain perceptions and views of managers' own career orientations and preferred career path in the Third sector rather than a critique of their present organisation.

### **Data Analysis**

The approach adopted for this research is inductive. An inductive approach has its roots in social science and seeks to interpret data in order to address a problem or answer questions that are raised at the outset of the research (Gibbs, 2007, Saunders et al.; 2007, Bryman and Bell, 2007). The inductive approach supports the philosophical approach (interpretivism) adopted for this research. Details of the data coding and analysis process for the study follows next.

### **Data Analysis Process**

In order to satisfy the research goal, the data analysis process began during the data collection period. After each interview, the researcher noted how participant responses would help the study to answer the research questions. The researcher personally transcribed each interview within 24 hours of conducting the interview. During transcription a preliminary analysis was conducted, the researcher noted how certain concepts and themes were communicated. The researcher explored how each participant communicated concepts. The concepts were determined by theoretical concepts explored in the literature review. A computer-assisted qualitative data analysis software (CSQDAS) package Nvivo was used to systematically manage and assist in the analysis of the data.

### **Data Coding Process**

A manual process of reading and checking the data was undertaken by the researcher to check accuracy of the transcribed interview data. Data were then imported directly from a word processing package into Nvivo; simultaneously creating cases with each transcript. The researcher employed a deductive coding approach for the initial coding stages. To help create a deductive theoretical framework for coding, the researcher referred to Ritchie and Lewis (2003). As expected during the analysis new codes which are referred to as nodes in Nvivo emerged, thus inductive coding became increasingly relevant as the analysis progressed (Boeije, 2009).

Each node created was given a short description. The nodes were used to organise relevant segments of the data by assigning meaning to the descriptive information from the participant responses.

Having consistently formatted the transcripts they were then auto-coded within Nvivo. This produced distinct tree-nodes, containing relevant data from each transcript. Not all the codes generated from the auto-coding were found to be useful for analysis, given the focus of the research. Some of the codes were placed into separate auto-codes and not utilised as

tree nodes. Other useful nodes and free nodes were merged with similar nodes, for example 'clients' were merged into 'client group' tree node. Other useful nodes and free nodes were merged with similar nodes. This was necessary to maintain organisation and order within the data. Some nodes were assigned U or Z to denote inactive status.

The coding process is quite iterative and tedious and Bryman and Bell (2007) suggests it involves a process of constant comparison. The researcher spent about 22 days coding the data to ensure that the right data was coded to the right nodes. Another challenge was to decide how much text should be coded in the nodes. In some instances a few words were coded and in other instances an entire paragraph constituted a code. When most of the initial open coding was done, the next phase included axial and the selective coding stage with the use of tree and child node hierarchal system ( Boeije, 2009).

Once most of the coding was done, the researcher was able to use memos to record any thoughts occurring about the content of the transcripts during the coding process. Memos were attached to coded data segments to track and identify the source of the responses. All the responses to a particular interview question were coded together and this new node was interrogated through the search facilities. This helped to improve the rigor of the analysis process by validating the researcher's own impressions of the data.

## **Conclusion**

This paper has identified the theoretical perspectives underpinning the research design. The reason for choosing a qualitative approach (case study) for conducting the study was explained; as enabling the study to gain an understanding of the interpretations and perspectives of the Third sector managers' career orientations and preferred career path. It provides a detailed account of the research sequence and this addresses the procedures that were followed during data collection. Ethical issues and methodological rigor of the research have been considered. Finally, the way the data were organised for analysis and the procedures developed for analysis of the data are discussed.

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