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# Developing Mutually Beneficial Relationships between Researchers and Organizations

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# Developing Mutually Beneficial Relationships between Researchers and Organizations

## **Abstract**

[Excerpt] The keys to organizational success are constantly changing. As the global economy evolves in the direction of knowledge-based enterprise, the ability to create and manage information is essential. The decisions that managers make have large operational and financial implications. However, managers often lack the information needed to make sound decisions. When faced with challenges in their organizations they may rely too heavily on personal experience or obsolete knowledge. Often, they turn to consultants for assistance.

There are a large number of academics who study issues important to managers, yet the results of their work are often not communicated effectively to the practitioner audience. In addition, academics often find it difficult to gain access to organizations to obtain the data necessary to conduct high quality research. In short, there seems to be a “disconnect” between the needs of the business community and academic research. Though numerous calls for more academic/ practitioner collaboration have been made, there has been relatively little progress in achieving it.

## **Keywords**

organizational success, information management, academic research, academic/practitioner collaboration

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# Developing Mutually Beneficial Relationships Between Researchers and Organizations

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The keys to organizational success are constantly changing. As the global economy evolves in the direction of knowledge-based enterprise, the ability to create and manage information is essential. The decisions that managers make have large operational and financial implications. However, managers often lack the information needed to make sound decisions. When faced with challenges in their organizations they may rely too heavily on personal experience or obsolete knowledge. Often, they turn to consultants for assistance.

There are a large number of academics who study issues important to managers, yet the results of their work are often not communicated effectively to the practitioner audience. In addition, academics often find it difficult to gain access to organizations to obtain the data necessary to conduct high-quality research. In short, there seems to be a "disconnect" between the needs of the business community and academic research. Though numerous calls for more academic/practitioner collaboration have been made, there has been relatively little progress in achieving it.

In a recent issue of *Organizational Dynamics* addressing the "manager-organizational scientist collaboration gap," John Ivancevich and his colleagues note that researchers and managers could benefit from a better understanding of and respect for each other's perspectives. They propose increasing the professionalization of management and researcher/practitioner interactions through innovative initiatives such as jointly developed practice guidelines, joint educational forums, temporary role-switching, and scientist-practitioner guilds. We suggest that in addition to these useful recommendations, there may be some relatively simple and straightforward ways to reduce this gap through concerted efforts by both parties to cooperate in research projects. We believe that this can be achieved through: (1) a greater awareness of the possible benefits of cooperation (2) an understanding by both parties about what is involved and how to negotiate a mutually beneficial relationship and (3) the initiative to get started.

An example of the positive outcomes resulting from effective interaction between practitioners and academic researchers is succinctly captured in a recent quote from an article in the *Academy of Management Journal* by Lucy Gilson, John Mathieu, Christina Shalley, and Thomas Ruddy:

Participants for this study were customer service technicians from the Canadian division of a multinational organization that sells, services, and maintains large office equipment. Various divisions of this organization have sponsored other published work ... because of an ongoing collaborative relationship between this organization and academicians that has served to benefit and inform both groups.

The fruits of collaboration captured in this quote are the result of a seed that was planted in graduate school and nourished over the years by interaction between two of the authors at professional conferences. Whereas Mathieu pursued a career in academia, Ruddy went straight into industry. In the rush to improve the operations of his corporation through the deployment of technology and team-based organizing, Ruddy did not have time to write and revise articles for academic publications. He recognized that he needed bright minds to identify and extend applicable theory to new problems in the organization. The academics simultaneously desired "real-world" data to answer theoretical questions. What started through informal conversations at professional meetings culminated in a series of research collaborations that have resulted in more than a half dozen top-tier research publications over the past decade.

In order to examine the potential benefits of collaborative research, we begin by drawing upon success stories from practitioners who have partnered with researchers for academic research projects and from researchers who have completed successful field studies with the cooperation of organizations. We then introduce the Dual Concerns Model, a model used in the area of two-party negotiations, to illustrate the various ways in which organizations and academic researchers can choose to approach research relationships given their dual perspectives and concerns. We conclude with recommendations for conducting collaborative research in organizations.

### **THE PRACTITIONER PERSPECTIVE**

In order to gain insight into the views of business practitioners, we conducted interviews with top executives at three very different companies. Each of these individuals has supported research activities in his respective organization in the past. The first interviewee was Paul Tucker, chief administrator, Highline Medical Center (HMC), Seattle, Washington. HMC is a regional healthcare provider with 275 physicians and over 1,500 staff members. The second was John Longstreet, senior vice president of people strategy at ClubCorp, the largest private club management company in the U.S., with over 16,000 employees at 160 locations. The third was Craig Cole, president and chief executive officer (CEO), Brown & Cole Stores of Bellingham, Washington. Brown & Cole is a regional supermarket chain of 34 stores and 2,200 employees, and is one of Washington's largest privately held companies.

We asked each of them four questions. The first was "Why did you participate in an academic research project?" The second was "What made the research project successful?" The third was "What were the criteria for success?" The final question was "What advice would you give to researchers who are trying to work with organizations?" Each executive had his own specific responses to these questions, but several common themes also emerged. We will present a synthesis of the interview responses for each question.

#### **Question 1: Why Did You Participate in an Academic Research Project?**

All three responded that they hoped there would be some benefit to the organization. For example, Mr. Longstreet said "We must gain something from the research to help us in our business. There must be a win/win situation; we won't simply support a noble cause." The word "relationship" came up frequently in the interviews. Each research initiative was viewed as an opportunity to develop a larger relationship with the university, including factors such as recruiting, guest speaking, and consulting. One executive noted that the topic proposed by the researcher was interesting. Cole

mentioned that the project provided him with the opportunity for personal development, "I would learn, grow, and expand my knowledge by participating." There was also the expressed desire to support scholarship, acknowledging the importance of academic research. Tucker stated he would support academic research in the future "if I thought it was worthwhile from an academic standpoint - will it make a difference in the world?" Clearly, all three executives saw research as an opportunity to help themselves and/ or their organizations, and would most likely not have participated if this potential for symbiosis did not exist. In summary, the proposed research must be viewed as relevant, interesting, important, and beneficial to the participating organization.

### **Question 2: What Made the Research Project Successful?**

There was resounding consensus on this question, as all three executives said that a relationship of trust between the researcher and the organization is critical to success. Cole discussed "the need to be embedded in the organization with the time to observe, connect, and be accepted." The researchers need to establish their credibility in part by showing an in-depth understanding of the dynamics being explored. Their ability to answer questions and have the participants "buy into" the research at all levels of management is also critical. Mr. Tucker stated, "If there is a relationship where you [the practitioner] know the people [the researcher], there is more trust and I don't have to worry about the minutia. Plus, if you run into problems, you can deal with them." Similarly, there was unanimity with respect to understanding the context and business needs of the host organization. This reduced the probability that the research might hinder day-to-day operations.

The issue of response rate, the extent to which employees are willing to participate in interviews, focus groups, or completing questionnaires, was discussed and provided some interesting insights. Once again the issue of trust emerged as important. Organization culture and management-employee relationships were often mentioned. Mr. Longstreet recalled that in a previous study "response rate to surveys was very high because managers wanted feedback and employees wanted to share their opinions." He also noted that that this is not always the case in an organization where trust is lacking. The cues that are sent formally or informally from management can have a big impact on subordinates' willingness to participate. If top management signals that the study is important, that message will likely be communicated down through the organization resulting in greater participation. Factors such as the timing and frequency of surveys in the context of survey fatigue were discussed, as well as the importance of confidentiality.

### **Question 3: What Are Your Criteria for a Successful Research Project?**

The key word in the answers to this question was "actionable." The executives earlier stated that they participated in hopes of getting some benefit from the project. If the study resulted in a report or recommendations of some sort that would help the operations, the project would be deemed successful. Cole stated that success would come when "the researcher gets what he wants and produces a significant deliverable for the organization." He also emphasized that results need to be simplified and noted that they were useful "to the extent to which information can be boiled down" for use by managers. This requires the researcher to connect the data and translate the findings for the organization's use. It was recognized that surveys may raise employee expectations. Therefore it is critical that researchers and employers follow through on their commitments.

### **Question 4: What Advice Would You Give to Researchers?**

There was consensus on a number of themes in the responses to this question. Work to assure goal congruency between the researcher and the organization. Further, assure that what is being studied is a meaningful topic with both academic value and relevance to the organization. If researchers understand the issues that are important to an industry, it is more likely they will be able to relate their

work to the issues facing the organization.

The importance of developing a relationship surfaced once again. To initiate the process, Tucker suggested that researchers "make a personal appeal with a letter followed up with a telephone call. 'Can I take you to lunch to discuss some research ideas?' Once they see you are a good person, a competent researcher, and easy to work with, they are more inclined to help. Develop the relationship first and come back to do research later." Clearly this will require that the researcher do his or her homework to understand the organization's operations in order to articulate the potential benefits of the research project.

Moreover, the scope of the project must be jointly negotiated. Researchers need to understand clearly both the benefits and the costs to the firm (e.g., employee time to complete surveys, management time to organize and execute). Flexibility is important with respect to survey administration dates and it may also be necessary to bridge interests and include variables that are important to the organization in the study. The use of multiple response modes such as paper, telephone, and internet was suggested for survey research. If there is a collective bargaining agreement in place, union relationships may be important and must be taken into account. Integration into the ongoing activities of the organization was stressed, as academics may not be as sensitive to schedules and deadlines as business people. Once decided, a formal organized logistics schedule for survey distribution and final reports must be met.

The three executives agreed that it is important for researchers to have contact at the most senior levels possible. Relationships with line managers are also very important. When researchers take the time to listen carefully to leaders in the organization to understand their pressing business challenges, they are likely to design research that provides tangible benefits for the organization. Put differently, researchers cannot expect to develop successful collaborative relationships by pursuing projects that do not address "burning platform issues." Finally, Longstreet noted, "Understand the business, create a win/win situation, and remember the bottom line is the bottom line."

### **THE ACADEMIC PERSPECTIVE**

To obtain the academic perspective we interviewed three noted scholars. Although their methodologies might vary, all have had great success working with organizations or organizational members in conducting their research and lend useful insights into implementing academic research in organizations. They are Henry Mintzberg, Cleg- horn Professor of Management Studies, McGill University; Thomas Lee, Hughes M. Blake Professor of Management at the University of Washington; and Chester Schriesheim, University Distinguished Professor of Management at the University of Miami. We asked each of them about his particular experiences working with organizations. Three questions are discussed herein. They are, "How have you been able to gain access to organizations to conduct research studies?" "How do you conduct a successful study?" Finally, "What are the outcomes of a successful study?"

#### **Question 1: How Have You Been Able to Gain Access to Organizations to Conduct Research Studies?**

All three academic researchers stressed the importance of studying a relevant, salient, or, at minimum, interesting issue for organizations. Lee and Schriesheim insist that, particularly with collaborative projects in which organizations are intimately involved, the issue must be important to the organization. There must be a clear benefit for them, even if it is only a better understanding of the way they are currently operating. Lee suggested pursuing a topic that is interesting to both top managers who must approve the study, and employees whose participation will be required. Mintzberg, when asked about advice he would provide for researchers hoping to access organizations, responded, "Do something which they'll find interesting, not because they'll let you in, but because if they don't find it

interesting, it's probably lousy." He also advised putting organizations at ease "in terms of how you are going to record [data], whether it is confidential or not, and precisely what you are going to do with it [analyzing data]."

Schriesheim encouraged researchers looking to do collaborative research to "identify an organization that may possess traits, characteristics, or issues that you are interested in - for example stress and air traffic controllers." The benefit of a well-crafted research proposal was emphasized, including an offer to give something back (e.g., training, feedback, or managerial reports) in exchange for the company's assistance. Calling on any contacts in the organization and leveraging the reputation of the university were also suggested.

### **Question 2: How Do You Conduct a Successful Study?**

All three researchers agreed that obtaining top management support for the research initiative has been important for their projects. Line level support for implementation is also very helpful. Interaction with the organization at various levels may be important during the planning and data collection stages. Examples of this include focus groups of employees and interviews with managers. Said Lee: "We worked out our sampling plan with supervisors ... and interviewed different managers to figure out the best way to collect the data." Moreover, while researchers have responsibility for the design of the study, organizational members' knowledge of their companies can be useful in directing data collection. We asked Mintzberg about the role of participating organizations in the design of his strategy tracking studies. He responded that although organizations did not have input into the overall research design, they did help identify strategy areas to study by providing information on key areas of activities and on whether or not his team could collect data. With respect to achieving employee participation in the research, trust was again mentioned as important. Lee suggested that the initiative be clearly identified as a university research project, with researchers being perceived as independent from management. To get "fence sitters" to participate, it is important to maintain anonymity by returning any questionnaires or other materials to researchers, minimizing any potential identifiers, and keeping the survey as short as possible. Offering to provide study participants with feedback can be very beneficial. A final point is to follow through on any commitments that were made to the organization.

### **Question 3: What Are the Outcomes of a Successful Study?**

Lee focussed on the importance of obtaining good quality data. In reflecting on the success of an important field study his research team undertook at a major international bank, he said, "The study was a success because we got everything we asked for. The quality of the data was 'awe-inspiring,' in the words of one of our reviewers." The second outcome was ultimately publishing articles in quality journals. "When you collect the data you can never be sure exactly what you are going to get, and getting a refereed manuscript accepted at a quality journal confirms the value of the study" says Schriesheim. Last, but certainly not least, is the benefit that the company receives from the study. The results need to be communicated to management in a form that they understand and can work with. A side effect of this interaction may be that relationships develop and strengthen.

To summarize, from the perspective of the practitioners interviewed there are four potential benefits of cooperating on academic research projects:

1. obtaining "actionable" research results,
2. experiencing interesting opportunities for personal or professional growth,
3. strengthening relationships either with a particular researcher or with a university, and
4. making a contribution to the advancement of knowledge in general or at a specific university.

From the perspective of academic researchers the key benefits from cooperative research include:

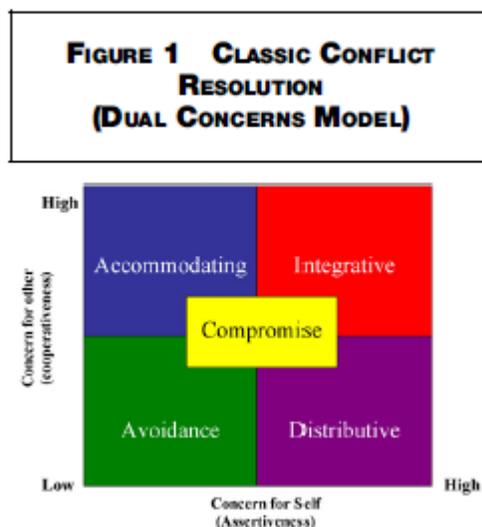
1. obtaining high-quality organizational data
2. creating opportunities for top-tier journal publications
3. impacting managerial practices, and
4. developing meaningful relationships with leaders in organizations.

This feedback from both sides of the "great divide" demonstrates the potential for mutual benefit and positive experiences. In fact, for these individuals, there did not seem to be a great divide at all. Their worlds do not seem to be as far apart as we might have imagined. Both sides seemed to have wanted to fulfill the others' needs in some way, whether through contributions to scholarship or through benefiting the organization - which, as Professor Lee noted, constituted part of the success of his project.

If there is so much potential for successful outcomes from collaboration between researchers and organizations, why does it occur so infrequently? We suggest that there are three primary factors involved. First, organizations do not often think about the potential benefits of working with academic researchers or about how to approach researchers to study a particular issue. Second, researchers are often inexperienced with and unaware of how to successfully approach organizations. Third, the specific steps involved in conducting mutually beneficial research may not be clear to either side. These issues are rarely addressed in the university courses taken by organizational leaders or in the doctoral programs attended by most organizational researchers.

### THE DUAL CONCERNS MODEL

In order to conceptualize the ways in which academics and organizations can approach the idea of developing a working relationship to implement management research, we draw upon the Dual Concerns Model from the negotiation/conflict-resolution literature. The Dual Concerns Model asserts that parties in a negotiation may have two types of independent concerns: a level of concern for their own outcomes and a level of concern for the other party's outcomes. This model is predicated on the belief that it is possible to create situations where both parties in a relationship, even those with very



different perspectives, can benefit. As can be seen in Fig. 1, the level of concern can vary from low to high on either dimension. Put differently, the stronger a person's concern for his or her own outcome, the more likely the person will be to pursue strategies located on the right side of the figure. The stronger a person's concern for the other party, the more likely he or she will pursue strategies located at the top of the chart. While there are many potential points of intersection between the assertiveness dimension (the horizontal dimension) and the cooperativeness dimension (the vertical dimension), scholars have identified five major strategies for negotiation. We will first discuss characteristics of the distinct strategies and then show how they apply in the context of academic-practitioner research cooperation.

*Avoidance* is the strategy in the lower left corner. It is unassertive and uncooperative. When avoiding, a person does not immediately pursue his or her own concerns or those of the other person. He or she does not address the issue. Avoiding might take the form of diplomatically side-stepping an issue, postponing an issue until a better time, or simply withdrawing from a bad situation.

*Accommodating* is the strategy in the upper left corner. When accommodating, an individual neglects his or her own concerns to satisfy the concerns of the other person. Accommodating involves lowering one's own aspirations to let the other obtain his or her objective.

*Distributive* (also called *competing*) is the strategy in the lower right corner. It is assertive and uncooperative. When competing, an individual pursues his or her own concerns at the other person's expense, using whatever power seems appropriate to win his or her position. This approach is sometimes called the "win/lose" approach.

*Compromise* is the strategy in the middle of the Dual Concerns Model. It is intermediate in both assertiveness and cooperativeness. When compromising, the objective is to find an expedient, mutually acceptable solution that partially satisfies both parties. Compromising falls on a middle ground between competing and accommodating. Likewise, it addresses an issue more directly than avoiding but doesn't explore it in as much depth as collaborating.

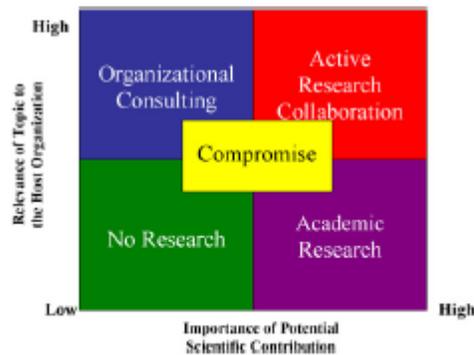
*Integrative* (also called *collaborating*) is the strategy in the upper right corner. Pursuing an integrative strategy means that an individual is both assertive and cooperative. When collaborating, the individual attempts to work with the other person to *find a solution that fully satisfies the concerns of both*. It involves investigating an issue comprehensively to clearly understand the underlying concerns of both parties and then searching for alternatives that meet both sets of concerns. In enacting an integrative strategy, the parties will often explore a disagreement to learn from each other's insights, with the aim of finding a creative solution to the problem. This approach is often referred to as the "win/win" approach because of its focus on maximizing the joint outcomes for the parties. What is required seems so logical, but is not often enough followed: to communicate one's needs effectively, to actively listen to the other party's perspective to understand his or her needs, and to be flexible in working toward a mutually beneficial outcome.

### **Applying the Dual Concerns Model to Academic/Practitioner Research Relationships**

In modifying the Dual Concerns Model to fit the current context, we renamed the axes. The horizontal dimension now reflects variation from low to high *importance of potential scientific contribution* and the vertical dimension reflects the *relevance of the topic to the host organization*. At the various new intersections created we have noted the most appropriate response for researchers and organizations to pursue.

In the lower left-hand quadrant is *no research* (see Fig. 2). An example of when to avoid engagement would be when the research topic has little relevance or interest for organizations and offers little contribution to science. The researcher should recognize that the proposed project should not be pursued. The avoidance strategy has relatively few risks and protects precious resources (e.g., researcher and practitioner time, reputation, etc.).

**FIGURE 2 MANAGEMENT RESEARCH (DUAL CONCERNS MODEL)**



Accommodating the needs of an organization without regard for research aims or hope of making a significant scientific advance is unlikely to result in a theoretical contribution. Hence, the researcher and the organization are probably better off to pursue a "*consulting*" relationship. Alternatively, a researcher might choose to do one project that is of high interest to the organization in exchange for access later to conduct a different and more scientifically meaningful project.

Attempting to secure access to conduct high-quality research when there may be little perceived immediate value, interest, or relevance to the organization is likely to yield considerable frustration (distributive quadrant). Moreover, it is unlikely to produce good research because of the bias it introduces. If a researcher approaches an organization and proposes purely *academic research* without regard for organizational realities or interests, the study is unlikely to receive top management support. Thus, response rates will suffer, as may validity and generalizability. Topic, timing, and integration into natural business rhythms and relevance all must be considered.

An alternative for researchers studying issues that lack an immediate, obvious benefit to organizations may be to seek sponsorship from entities that have a longer range perspective or a reduced need to show an immediate payoff. Government (e.g., National Science Foundation, Army Research Institute for the Behavioral and Social Sciences) and other institutions (e.g., Alfred P. Sloan Foundation, Citigroup Behavioral Sciences Research Council) are often the sponsors. Some of the issues supported by formal sponsored programs relate to emerging topics or future concerns. There are a number of advantages to these programs, including a critical review of the research program in advance of the study to ensure thoughtful design at a time when it can still be altered (e.g., sampling, topics, data collection technology). Funding for the research and sponsorship of conferences and connections to related work are additional positive aspects for researchers. We label the quadrant where these research activities takes place pure *academic research* to recognize the potential for its long-term value.

*Compromising* is a natural part of life. Most people are comfortable with it and recognize that

you can't always get exactly what you want. The risk is that because people do it often and are comfortable with it, they compromise too quickly - when in fact there may be a way to achieve both groups' objectives without having to give up something important. As Mary Parker Follett, a pioneer in the area of human relations has stated: "In compromise, neither side gets what it wants." Thus, we encourage researchers and practitioners to engage in deeper dialogue to achieve collaborative agreements.

*Active research collaboration* is the key to producing research that is both relevant to and respected by both parties. Through collaboration, organizations facing difficult questions to which they lack clear answers, and researchers seeking to answer such questions while advancing management theory can both benefit. In developing a cooperative relationship between an organization and researcher, there exists the potential for "positive tension" that arises from the different perspectives, viewpoints, skill sets and backgrounds of practitioners and academic researchers. It requires time, trust, and resource commitments from both parties for successful implementation, because one party alone cannot solve the problem.

To illustrate the potential value of collaboration between organizations and researchers, here is an example of a study published in a top-tier academic journal that provided benefit to the organization involved, in addition to creating new and relevant knowledge for the academic community. In the late 1990s a research team conducted a collaborative research project with 10 *Fortune 500* companies in the midst of organizational design restructuring. The companies were interested in working with academic researchers to learn how to accelerate these organizational transitions. The researchers were interested in understanding the roles of collaborative initiatives within joint research projects in determining organizations' perceptions about the usefulness of academic research. The research team was able to provide data to the organizations comparing business units that were quickly progressing through the transition versus those that were struggling. This benefited the organizations in their continuing transitional processes, while the researchers were able to examine the impact of particular collaborative initiatives that helped further their theoretical model. To be successful in collaboration, both parties must be open to new ideas, respect the other party's challenges and constraints and be willing to adapt.

It is helpful if both parties share a common desire to learn, particularly about the other party's perspective. For example, an academic research study published in 2002 examined the risk factors associated with employee drinking behavior in a variety of organizations. The costs of employee drinking can be significant for employers; thus, the topic is very relevant. For researchers, the topic is understudied because it is very difficult to collect quality data on this sensitive subject. Employees would potentially be concerned about information being shared with management and therefore be reluctant to participate. The academic value of such a study, if properly implemented, is very significant. In this case, the researchers spent 18 months working with several unions before conducting the study, in order to gain their trust and cooperation. The results of the study had major implications for the union and organizations and also provided meaningful results for the research community.

### **INITIATING COLLABORATIVE RESEARCH**

Assuming both organizations and researchers warm to the idea of collaborative research, how can researchers access organizations to implement it? Lynn Shore, professor of management at San Diego State University and associate editor of the *Journal of Applied Psychology*, submitted a proposal to a CEO of a multinational organization based in the southeastern United States to conduct a two-year project. The proposal promised to provide valuable information for the company on the effects of manager and employee ages on work attitudes and decisions in that organization. The organization agreed to the proposal due to the relevance of the topic, and because the CEO wanted to show support for the university - with which he had an ongoing relationship. Shore took the time to meet with the top

management team to understand issues faced by the organization. The organization reviewed and approved the surveys. All administrative issues, including sample selection and survey distribution, were jointly planned with operations managers within the organization. Shore offered to have surveys sent directly to the university to maintain confidentiality. Once the study was completed, she and her colleagues provided written and oral reports to the executive team. Not only did the company allow the study to be implemented, but they also paid for all costs associated with the production and distribution of the survey.

In another case, Professor James Smither of La Salle University met Dr. Alan Walker, a future co-author who worked in industry, at a conference at which they were both presenting. Smither suggested that Walker's research could not only be of applied interest but also be publishable in academic journals. This led to an ongoing collaboration with multiple research projects at the regional bank where Walker worked, resulting in organizational benefits and multiple academic publications that have been widely cited. This example also demonstrates that relationships need not necessarily always be initiated through the CEO. Many may be initiated through middle management and then carried throughout the organization.

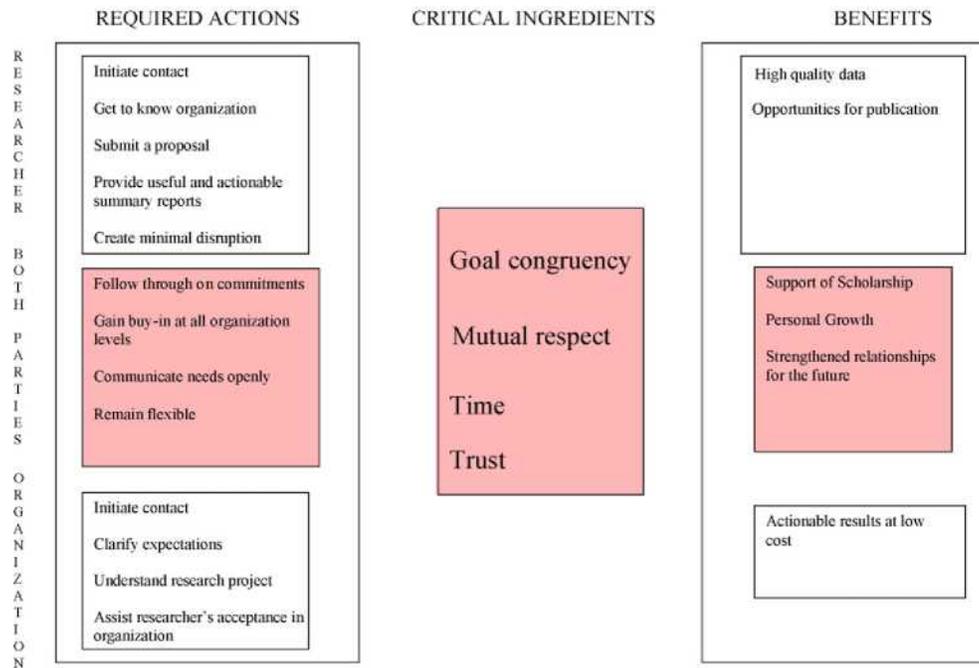
Finally, one of the authors of this paper was contacted by a trade association and asked to conduct a study demonstrating that conference centers were superior to hotels for conducting professional meetings and conferences. The association offered to provide full funding for the study. The author said no to the initial request, but then suggested an alternative research project. He proposed that he conduct a study that identified those physical and service attributes associated with successful meetings, then compare these attributes across hotels and conference centers using three respondent groups: meeting planners, meeting attendees, and meeting presenters. In this manner, he was able to objectively and rigorously examine the research question. The association agreed and provided funding and support for data collection and presentations. The overall results of the study provided empirical evidence showing that conference centers were rated more highly on most of the attributes, but also revealed that some of service aspects were rated more important than the physical characteristics of the facility by all three respondent groups. This resulted in conference center operators investing more money in developing competent staff as a way of differentiating their product. In addition, from the research perspective, a typology of meeting facility characteristics was developed that has been useful in subsequent studies. This last example is one that demonstrates how to move a project from the "consulting" quadrant to the "active research collaboration" quadrant, increasing the overall value to both the practitioner and the academic researcher.

While there are many benefits from collaborative research, it may not always go smoothly. For example, in addition to working carefully with management, there may be other important stakeholders to involve in design discussions. A few years ago, one of the authors of this paper received approval and support for a major research project from the top executives of a health-care organization. After the researcher had collected data on job satisfaction (e.g., including pay and benefit satisfaction), the nurses union filed a grievance with the National Labor Relations Board, asserting that the organization and researcher acted in bad faith by collecting data that could undermine the union in upcoming contract negotiations. Ultimately, the NLRB ruled that the organization and researcher had not acted inappropriately. Nevertheless, responding to the grievance consumed valuable time and other resources. An important lesson here is to consider all constituencies that may be affected by the study (e.g., respondents, participants, and those affected by results) when designing a research project, especially if there is union representation at the host organization.

### **BEST PRACTICES IN COLLABORATIVE RESEARCH**

Fig. 3 provides a summary of what it takes for both researchers and organizations to successfully

implement cooperative research, as well as the benefits that may result. First and foremost, before attempting to collaborate, researchers need to realize that there must be a motive for organizations to participate in academic research. Organizations may act



out of a desire to make contributions to scholarship and relationship building, but if the topic is viewed as relevant and interesting to the host organizations the project is much more likely to be embraced. Researchers can initiate contact by working with partners in academic centers, by building upon pre-existing relationships with organizations (e.g., recruiting), by working through professional associations, online practitioner message boards, conferences, and through personal contacts that the researchers, colleagues, or friends of the researcher may have with organizations. Further, though researchers may not be explicitly rewarded for publishing their ideas in non-refereed publications, doing so will help to establish them as subject matter experts in the eyes of the practitioners, who are more likely to read trade magazines than "top-tier journals." Researchers might rightly characterize such activity as an investment in future research opportunities.

Organizations may make contact with researchers through research centers or academic departments at universities and a variety of professional and academic conferences. For example, the vice president of a company looking to better understand challenges his organization faced with respect to employee geographic distribution met a doctoral student, now an assistant professor, at a conference at Stanford University. They began a dialogue that led to a research project incorporating the variables of interest for the organization, as well as other issues that the doctoral student was looking to study for his dissertation research. The collaborative effort led to feasible solutions for the organizations and an awardwinning research paper for the doctoral student. Another way to initiate contact with management researchers is through special practitioner sessions sponsored by research organizations such as the Academy of Management and the Society for Industrial and Organizational Psychology. These conferences offer forums for meetings between practitioners and researchers to discuss issues of interest to both.

Dr. Thomas Ruddy, now of Siemens, noted that as a practitioner one of the best forums for

developing joint research projects has been through Ph.D. student internships. Organizations value the relatively inexpensive but highly skilled labor the students can provide. At the same time, through their immersion in the organization, the students become keenly aware of important issues and initiatives. As the students engage in dialog with their faculty regarding important new directions in theory in different domains, first-hand connections can be made to organizational imperatives and mutually beneficial research conceived.

From these examples above and others presented previously, it is clear that a working relationship between the organization and the researcher must be developed - and this may take time. For the researcher, this may begin with gaining an understanding of an industry and then the focal company, ideally spending time at the organization prior to conducting the study. From this interaction a formal proposal could be developed to meet the need of the organization and the researcher. The importance of getting to know an organization has been emphasized by practitioners, who stress the importance of designing and conducting the research so as to benefit the organization. However, benefits for the researcher of getting to know an organization are equally valuable in terms of optimizing research design and administration. The support of upper management is critical, as is trust within the organization and between the organization and the researcher. The researcher must be flexible, willing to adapt measures, add variables, alter timing, and keep to schedule. Once a schedule has been established, it must be adhered to. There is an expectation on the part of the organization that the researcher must manage the process with minimal disruption.

Academic researchers provide a potentially valuable resource for examining organizational problems that lie within their sphere of interest and expertise. There may be costs incurred in supporting a research initiative. However, there will likely be a significant difference between the costs and benefits of using a consultant versus university-based researchers. Consultants are paid to solve problems quickly and may be encouraged to impose solutions on problems that may or may not work. Researchers, intent on obtaining publishable results, will take a more academic approach to the issue. This may take more time, but both researchers and organizations may reap great benefits. With high levels of participation, quality unbiased data could be obtained on the variables of interest to both researcher and the organization. To assure the rigor of the study, the researcher would approach the situation objectively, use an appropriate study design, analyze and interpret the data accurately, and present the results in their proper context. These results could then be translated into language that management understands and sees as actionable. Relevant feedback could also be provided to study participants.

In conclusion, we recognize the wisdom of Mary Parker Follett, who said, "We get progress when we find a way that includes the ideas of both or of the several parties ... but this requires hard thinking, inventiveness, ingenuity. We should never think of integration as a foregone conclusion; it is an achievement."

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