

# Grounded Theory: A Practical Overview of the Glaserian School

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## ABSTRACT

In many parts of the world, qualitative research is still new. This can be evidenced in the limited number of qualitative research theses, dissertations, and journal article publications in Asian higher education institutions and journals. In fact, many institutions hardly offer qualitative research courses in their graduate programs. However, qualitative research is steadily growing. More and more people in many different fields are embracing it. Looking at the historical foundation of qualitative research, it is important to recognize the first publication of a qualitative research design by Glaser and Strauss (1967) half a century ago. This book is generally accepted as the pioneering work in the field of qualitative research. This manuscript presents an overview of what the classical grounded theory by these two pillars of qualitative research is all about and examples of

how to implement it effectively in carrying out a research study. This manuscript is intended to provide a practical understanding of grounded theory for novice qualitative researchers and a refresher for experienced ones.

**Keywords** — Grounded theory, Glaser, qualitative research, Philippines

## INTRODUCTION

Glaser and Strauss (1967) created the grounded theory (GT) methodology as a methodology to generate theory from data generated from the qualitative research methods. This was meant to be a response to the ‘grand theorists’ of that time (Holton & Walsh, 2017). In the 50 years since its initial use by Glaser and Strauss, GT has become the most used qualitative research design in the world (Bryant & Charmaz, 2010; Birks & Mills, 2015) or so do many claims. However, the methodology has been misunderstood and misrepresented (Charmaz, 2014), leaving novice researchers confused and disoriented. Hence, the purpose of this paper is to describe the main characteristics of GT, with the aim of assisting researchers wishing to use the methodology for the first time. As we describe different aspects of the methodology, we will illustrate it with our own journey and experience from using it. In the following sections, we will describe GT as a research design, the most frequently used types and sources of data, and options for data analysis and treatment. Then, we will offer conclusions and recommendations for successful use of grounded theory.

### **Defining Grounded Theory as a Research Design**

Glaser and Strauss define grounded theory as “the discovery of theory from data—systematically obtained and analyzed in social research” (1967, p. 1). It involves a “systematic, inductive, and comparative approach for conducting an inquiry for the purpose of constructing theory” (Bryant & Charmaz, 2010, p. 1). Even though today the term GT is also used to describe a method used to analyze data, the true key goal of GT is to generate a theory grounded in the data (Urquhart, 2013). Therefore, based on its purpose, GT is primarily a research design, as well as a method of data analysis.

Part of the confusion is due to differences in the application of the methodology between the two creators (Glaser and Strauss), and subsequent differences in researchers that followed. Hence, it is important to understand the key differences between GT schools. In this section, we describe and distinguish

between the different GT schools. Next, we compare the procedures used in the two main schools. Then, we briefly explain for which studies GT is suitable, and the key characteristics of a theory. And finally, we address a debated issue, the positioning of the researcher.

## GT Schools

Bryant and Charmaz (2010) suggest that the different current variations of GT can be classified into three main schools: the Glaserian, the Strauss and Corbin, and the Constructivist schools. The Glaserian, and Strauss and Corbin schools began due to a split between the founders of GT based on methodological and theoretical differences (Bryan & Charmaz, 2010). Strauss and Corbin (1990) offered a conditional matrix to help the conceptualization process, thus proposing a more formalistic methodology. The matrix is “an analytic device to stimulate analysts’ thinking about the relationships between macro and micro conditions/consequences both to each other and to process” (Strauss & Corbin, 1998, p. 181). On the other hand, Glaser (2002; 2013) claims to lead the *traditional* school (following the original 1967 methodology), arguing that the researcher should let the theory emerge freely from the raw data without the use of any restrictive formula. Later, Strauss and Corbin (1998), and Corbin and Strauss (2008) clarified that their paradigm or perspective is only one of many that can be applied. The third school, the Constructivist school, proposes that theory is to be mutually constructed by participants and the researcher, focusing on the interpretative and discursive elements of social experiences and meaning (Charmaz, 2005; Clarke, 2005). Glaser (2002b) contends that Charmaz (2000) collected her data over a protracted period, and hence constructivist data is simply another type of data.

Interestingly, while some authors (e.g., Birks & Mills, 2015; Mills, Bonner, & Francis, 2006) advocate philosophical differences underpinning each school, others (e.g., Charmaz, 2006; Glaser, 2005; Urquhart, 2013) suggest that GT is philosophy-neutral, and recommend looking at it “as a container into which any content can be poured... rather than seeking an inherent philosophical bias that may or may not be present in the method” (Urquhart, 2013). For Glaser (2005), the philosophical debate reduces the potential of GT. Nevertheless, to have an idea of the assumed philosophical differences, some researchers place the Glaserian School as critical realist (within post-positivism), the Strauss and Corbin school as interpretivist (with influences of pragmatism and symbolic interactionism), and the Constructivist school as its name indicates (e.g., Annells,

1996; Birks & Mills, 2015; Madill et al., 2000). Critical realist ontology assumes that “reality can never be perfectly apprehended” (Burrell & Morgan, as cited in Brand, 2009, p. 438), and hence the best possible understanding is achieved through critical consideration. Interpretivist ontology assumes that humans impose perceptions into the world, thus creating reality (Morgan & Smircich, 1980), while constructivist assumes local and specific constructed realities (Guba & Lincoln, 1994).

### **Characteristics of the Glaserian School**

Following the Glaserian school, Urquhart *et al.* (2010) and Urquhart (2013) describe GT as having four key characteristics: theory building is its purpose; ignorance of preconceived ideas, constant comparison, and theoretical sampling.

**The purpose is theory building.** The primary purpose of GT as used by Glaser and Strauss (1967) was the development of theory grounded in qualitative data. Thus, while secondary goals may be achieved through GT (such as qualitative data analysis), the key objective is theory building. While other qualitative designs such as phenomenology emphasize the lived and subjective experiences of participants and report data in a fairly raw form, GT is concerned with the theoretical statements that are abstracted from those experiences (Suddaby, 2006). Researchers, therefore, need to have theoretical sensitivity (Urquhart, 2013); that is, the ability to immerse in the field, ideas, and context where theory is being sought (Glaser, 1978), because it enables them to conceptualize the theory within the data. This is critical since a study that claims to use GT but does not result in a theory is not a GT study.

Theoretical sensitivity is the researchers’ “openness to new or unexpected interpretations of the data, the skill with which they combine literature, data, and experience, and their attention to subtleties of meaning” (Suddaby, 2006, p. 640). In other words, theoretical sensitivity is “the ability to see relevant data and to reflect upon empirical data material with the help of theoretical terms” (Kelle, 2005, para.11) in the process of theory building.

**Ignoring preconceived ideas.** The second characteristic, ignoring preconceived theoretical ideas, has brought much controversy. Glaser’s (1992) dictum is to ignore literature in the substantive field of inquiry until the theory is developed from data has advanced enough to relate to existing literature. The reason for this dictum is to assist the researcher in preventing existing theories

from contaminating, stifling, or impeding the generation of categories from the data. It is based on this assumption that in GT studies, the existing literature is one of the sources of data and usually no theoretical framework should be used before the beginning of the study. Glaser (2013) proposes, “when using GT, forget what you are supposed to find and just see what you are finding” (p. 5). A GT theory should be “free of preconceived frameworks of any kind” (Holton, as cited in Glaser, 2013, p. 5).

Similarly, Urquhart (2013) recommends allowing “the data to tell its own story in the first instance, build a theory, [and] then, subsequently, engage your theory with the theory[ies] that you thought you might impose initially. You can then see if your emergent theory confirms or challenges existing theories” (p. 17). Likewise, Suddaby (2006) points that there is a danger that prior knowledge may “force the researcher into testing hypotheses, either overtly or unconsciously, rather than directly observing” (p. 635). However, he explains that there is no justification for the ignorance of existing knowledge. Hence, Suddaby (2006) suggests reviewing several substantive areas (rather than reviewing research that focuses on a particular substantive area), being “aware of the possibility that you are being influenced by preexisting conceptualizations of your subject area” (p. 635), while unleashing new theory (rather than elaborating existing theory). In addition, he recommends researchers to continuously remind themselves that observations are a “function of both who you are and what you hope to see” in the study under exploration (Suddaby, 2006, p. 635). We propose you ignore the literature in your substantive area of study until your theory is developed. Then, use the extant literature as a source of data from which to theoretically sample.

**Constant comparison.** Thirdly, the process of analysis and conceptualization is achieved through constant comparison—the iterative process of deriving categories and more abstract classifications through comparison (Bryant & Charmaz, 2010). Every piece of data is compared with existing concepts to determine if it enhances existing categories, forms a new category, or links two of them (Urquhart et al., 2010). By iteratively comparing incidents, codes, categories, and a categories’ properties and dimensions, the level of abstraction increases until the theory emerges (Birks & Mills, 2015). Since constant comparison means simultaneously collecting and analyzing data, it violates the positivist separation between data collection and analysis (Suddaby, 2006). “It is the constant comparison of the different conceptual levels of data analysis that drives theoretical sampling and the ongoing generation or collection of

data” (Birks & Mills, 2015, p. 94). The possibility of comparing the data of one interview with the data of another interview, and at the same time being able to conduct an additional interview yields a tremendous result in the development of codes and categories for the theory.

In addition, the emergent theory is compared with the literature, and “constantly modified until it is fit, relevant, and adaptable... until the point of theoretical saturation” (Fukofuka, 2012, p. 53). Theoretical saturation is achieved when “the researcher sees similar instances over and over again... [becoming] empirically confident that a category is saturated” (Glaser & Strauss, 1967, p. 61). Theoretical saturation also signals the stopping of theoretical sampling for a given category (Birks & Mills, 2015). Hence, data collection stops after enough data has been collected to build a convincing theory (Morse & Field, 1995). Suddaby (2006) argues that the signals of repetition and confirmation of conceptual categories are pragmatic and depend on both the study’s context and the researcher’s theoretical sensitivity.

The Glaserian approach embarks on three types of comparison (Glaser & Strauss, 1967; Holton, 2007; Evans, 2013). First, by comparing incidents with incidents, concepts emerge. Second, from the comparison of concepts with more incidents, categories emerge (a higher theoretical development, densification, and saturation). Third, theoretical integration results by comparing categories to categories. In the Glaserian approach, constant comparison relies on an inductive-deductive mix (Evans, 2013; Glaser, 1978, 1992). While inductive analysis refers to extrapolating patterns from across individual cases to build conceptual categories (Bryant & Charmaz, 2010), deduction refers to a careful “grounded deduction based on an induced category, which directs the researcher on where to go next for data... (theoretical sampling) for comparative purposes” (Elliott & Higgins, 2012, p. 1). Thus, the deduction serves induction (Elliott & Higgins, 2012).

Glaser (2012) encourages researchers to be patient because constant comparison will eventually yield fruit. According to him, “Patterns are always there and will emerge, usually faster than expected, especially if the researcher starts with field notes and then coding the data immediately and then uses emergent questions from the coding to see if the codes work with relevance and fit” (p. 4). Hence, researchers need to be “open to what is really going on”, tolerant to ambiguity, to reduce the “‘what ought to be’ to ‘what is’” (Glaser, 2012, p. 5). According to Glaser (2012), when researchers suspend suppositions to see what is actually there, they experience joy and energy.

**Theoretical sampling.** Finally, the fourth key characteristic of GT is theoretical sampling, meaning that the next data source and the final sample size are determined analytically by the theory under construction (Andrade, 2009). Unique to GT, theoretical sampling ensures that the process of theory generation is emergent (Birks & Mills, 2015). Glaser and Strauss (1967) defined theoretical sampling as “the process of data collection for generating theory whereby the analyst jointly collects, codes, and analyzes his data and decides what data to collect next and where to find them to develop his theory as it emerges” (p. 45). Since theoretical sampling means that the theory under construction determines the next data to be collected, it violates the positivist notion that data is collected by a priori hypotheses (Suddaby, 2006). In traditional sampling strategies, the sample (what, who, where, how, when) is decided as part of the planning stage. However, since the goal of GT is to develop theory from the data, the emerging theory informs the researcher the what (data), who and how many (participants), where, how, and when to collect data (Birks & Mills, 2015). Hence, theoretical sampling is highly related to the researcher’s theoretical sensitivity.

Birks and Mills (2011) propose that in GT the process of data collection starts with purposeful sampling, and then continues with intercalated stages of constant comparative analysis (that generates theory) and theoretical sampling. However, Glaser & Holton (2007) propose to simply collect any data from the substantive area of interest (though starting with an expert can be helpful), keeping coding ‘open’ until the core category emerges. For them, theoretical sampling begins after the core category has been identified. Similarly, Charmaz (2006) claims that theoretical sampling begins after the development of categories.

## **Procedures in GT**

Following different GT schools, there are different GT canons and procedures available (e.g., Corbin & Strauss, 1990; Urquhart, 2007). Here, after a brief reference to the Corbin and Strauss School, we unpack the procedures of the Glaserian School.

Corbin and Strauss (1990) offer detailed procedures that are summarized in 11 canons. These are:

- 1) Concurrent data collection and analysis allow directing the researcher to the next interview or document through theoretical sampling, as well as capturing all relevant dimensions of the topic. However, concepts need to be repeatedly present to be retained.
- 2) The basic unit of analysis is the concepts, not the raw data.

- 3) “Categories must be developed and related” (Corbin & Strauss, 1990, p. 7). Groups of concepts form higher level and more abstract categories, the cornerstones of the theory. This abstraction is achieved by the concept’s properties, dimensions, conditions, interaction, and consequences. In turn, categories are related to form the theory.
- 4) Theoretical sampling is done “in term of concepts, their properties, dimensions, and variations” (Corbin & Strauss, 1990, p. 8), allowing representativeness of concepts (conditions, interaction, consequences, and variations), and consistency of indicators.
- 5) Constant comparison, the search for similarities and differences, guards against bias and render greater precision, and consistency.
- 6) Patterns and variations must be sought.
- 7) The theory must have some sort of process, whether in terms of stages, action, or flexibility.
- 8) Theoretical memos allow keeping track of categories, hypothesis, and emerging questions; thus, providing a solid base for reporting.
- 9) Relationships between categories should be developed and confirmed. Hypotheses should be revised during the research process, seeking to retain or disregard them.
- 10) Consulting other researchers or working in teams allows testing out concepts and relationships.
- 11) “Broader structural conditions must be analyzed” (Corbin & Strauss, 1990, p. 11), such as economic, cultural, political, and social contexts.

Corbin and Strauss (1990) recognize the risk of being labeled as formalistic and sectarian, but prefer to offer the above-mentioned procedures going beyond the original Glaser and Strauss’ (1967) canons.

On the other hand, the Glaserian school claims to remain true to the original Glaser and Strauss (1967) canons. One of its proponents, Urquhart (2007), offers five guidelines for GT:

- 1) If a research design insists on a literature review being conducted before the research is carried out, then conduct a literature review as orientation. Hence, the literature review should be of related (and not substantive) areas, to prevent from forcing the data to fit existing theories (Glaser, 2007).
- 2) Code directly for the theory. The coding should not describe superficial themes, but should be theory-centered.

- 3) Use theoretical memos. Memos should be used as theoretical insights of the relationships among variables.
- 4) Build the theory and compare it with other theories. The emergent theory should be compared with existing theories to guarantee novelty.
- 5) Clearly label the procedures. A clear chain of procedures from data to theory must support the outcome.

Glaser (1978; 1998) also offers a set of procedures. His chain of procedures is formed by inputs and outputs. While the inputs are collecting, coding, and analyzing the data, the outputs are categorizing, memoing, sorting, and writing the theory. In the input process, the researcher is expected to collect and simultaneously code and analyze the data. During this period, the researcher is expected not to read any literature in the substantive area. Such an approach helps the researcher prevent being influenced by the existing literature, which could contaminate the data analysis.

In the output phase, the researcher develops categories by linking open codes (see selective coding below), and writes his/her insights in memos. Theoretical memos are the “written records of a researcher’s thinking during the process of undertaking a grounded theory study” (Birks & Mills, 2015, p. 10). Memos are the ideas that impact the researcher’s mind while collecting and analyzing data that are useful for theory generation (Glaser & Strauss, 1967). Since memos help to generate codes and categories (Saldaña, 2009), they are important in data analysis as they help shift from description to abstract conceptualization (Glaser, 1978).

Glaser (1978) recommends starting to sort the codes anywhere and sort everything as it relates to the core category. Further, he suggests to write more memos while sorting and include them in the sorting, as a way to emerge new relationships between categories (theoretical codes), as well as reach density and saturation. As for each memo, “where does it fit in?” The fitting action occurs by *constantly questioning and comparing each idea to the emerging outline*, as the analyst moves back and forth between outline and ideas as he sorts” (Glaser, 1978, p. 123). The researcher sorts and sorts the memos again and again until he or she finally discovers the core category. Glaser (1998) suggests sorting of memos in a way to create the outline of the write-up report, dividing it into sections, paragraphs, and even sentences.

The last step of the output phase is about writing the theory. Following Glaser (1978, 1998), the writing starts with a first draft in which the theory is

explained without seeking grammatical perfection and style. Then, the literature is explored, analyzed, categorized, and intertwined into the writing. The literature may not be revered but it should be incorporated as more data into the analysis. It should be used to determine the place of the emergent theory within the existing body of knowledge. After several steps of rewriting, editing, and improving, the final body of the grounded theory manuscript can emerge as a result.

While reading a grounded theory paper, be reminded that every element of the GT—every category, dimension, and property—introduced must be based on the sources of data used.

The credibility of the theory should be won by its integration, relevance and workability, not by an illustration used as if it were proof. The assumption of the reader, he should be advised, is that all concepts are grounded and that this massive grounding effort could not be shown in writing. Also, that as grounded they are not proven; they are only suggested. The theory is an integrated set of hypotheses, not of findings. Proofs are not the point. (Glaser, 1978, p. 134)

In the written report of a GT study, the researcher should mainly concentrate on explaining the theory, giving limited space to illustrations. Hence, the reader should be informed that the grounding endeavor will be briefly exemplified. In addition, the reader should understand that “grounded” means suggestions, but not proof (Glaser, 1978). Therefore, the goal of a GT report is not to show how hypotheses were reached, but to modestly present the emergent theory. The theory may be viewed as a “slice’ of a growing theory” (Glaser, 1978, p. 141) from which the reader may benefit or further expand.

Lastly, a GT written report should intend to favor conceptual meaning over illustration. For this purpose, we recommend following Glaser’s (1998) two rules of writing a GT report. First, he recommends to “think theoretical codes, write substantive codes” (Glaser, 1998, p. 197). Hence, theoretical codes should be implied in the writing. Second, “try to always relate concept to concept instead of concept to people, which lowers the conceptual level” (Glaser, 1998, p. 197). Thus, the report should focus on concepts rather than on people.

### **Suitability of Grounded Theory Method**

In their argument, Birks and Mills (2011) argued that GT is appropriate when the purpose of the study is theory building—especially when there is a

paucity of research literature in this area (see also Glaser, 1978, 2007; Glaser & Strauss, 1967; Suddaby, 2006). Furthermore, GT allows the researcher to use theoretical memos to raise the level of abstraction from description to theoretical completeness. Birk and Mills (2011) argued that GT is appropriate when “the inherent process is embedded in the research situation that is likely to be explicated by the grounded theory methods” (p. 16). In GT, the researcher is expected to go beyond the description of data into the realm of theory with explanatory power (see Glaser & Strauss, 1967; Strauss & Corbin, 1990).

### Characteristics of a Theory

In GT, theories must meet the requirements of fitness, workability, relevance, and modifiability (Glaser, 1978, 1998):

1. Fitness: the theory must emerge from the data, must be modified by the data, and therefore must fit the data.
2. Workability: the theory “should be able to explain what happened, predict what will happen and interpret what is happening in an area of substantive or formal inquiry” (Glaser, 1978, p. 4).
3. Relevance: the theory should be relevant for explaining, interpreting, and predicting reality. “It deals with the main concerns of the participants involved. . . . [evoking] instant grab” (Glaser, 1998, p. 18).
4. Modifiability: the theory must be flexible enough to be modified as new data demands and new light about the new theory emerges.

There are two types of theories that can result from a GT study (Corbin & Strauss, 2015): substantive and formal theory. While substantive theories explain *particular* phenomena in specific areas (Charmaz, 2006), formal theories deal with *generic* issues, are more abstract, and are applicable in a much wider range of disciplines (Strauss & Corbin, 1998). Formal theories explain core categories void of people, time, and space (Glaser, 2006). For instance, a theory that explains how to become an accountant or a nurse is a substantive theory while a theory that explains how to become a professional in any field is a formal theory (Corbin & Strauss, 2015). Hence, most grounded theories are substantive. For instance, in Biaggi’s (2014) doctoral dissertation, the GT study offered a theory of unethical behavior derived from the perceptions of the leaders of Seventh-day Adventist organizations (substantive area). However, the theory was compared with literature from other substantive areas, such as business and management. Therefore, as a result of that comparison and of the level of abstraction reached,

the theory moved from substantive to formal theory (in this paper Biaggi’s thesis will be used to illustrate some concepts).

**Positioning**

Birks and Mills (2011) recommend GT researchers to position themselves in terms of philosophy, knowledge of the subject matter, findings expected, and concerns or fears (see also Brand, 2009; Crane, 1999; Suddaby, 2006). Since the last three elements are comparably easy, we will develop only the first one; that is, the philosophical positioning.

The researcher should compare different philosophical (or paradigm) typologies used in the respective discipline, and choose his or her philosophical positioning from those available. After analyzing three paradigm typologies (Burrell & Morgan, 1979; Crotty, 1998; Guba & Lincoln, 1994), Biaggi (2014) decided to use Crotty’s (1998) typology, because of its flexibility. Crotty (1998) offers a table with four elements: epistemology, theoretical perspective, methodology, and methods (see Table 1 below).

For Crotty (1998), the *methods* are the procedures selected to collect and analyze data, and the *methodology* is “the strategy, plan of action, process or design lying behind the choice and use of particular methods and linking the choice and use of methods to the desired outcomes” (p. 3). For him, the *theoretical perspective* is “the philosophical stance informing the methodology and thus providing a context for the process and grounding its logic and criteria” (Crotty, 1998, p. 3). Last, *epistemology* is “the theory of knowledge embedded in the theoretical perspective and thereby in the methodology” (Crotty, 1998, p. 3), the “*how we know what we know*” (p. 8). From Crotty’s perspective, all these elements come together to explain the philosophical underpinning of a GT study.

Table 1. Positioning from the Philosophical Perspective

Epistemology	Theoretical perspective	Methodology	Methods
Objectivism Constructionism Subjectivism (and their variants)	Positivism (and post-positivism) Interpretivism <ul style="list-style-type: none"> <li>● Symbolic interactionism</li> <li>● Phenomenology</li> <li>● Hermeneutics</li> </ul>	Experimental research Survey research Ethnography Phenomenological research	Sampling Measurement and scaling Questionnaire Observation <ul style="list-style-type: none"> <li>● Participant</li> <li>● Non-participant</li> </ul>

Epistemology	Theoretical perspective	Methodology	Methods
	Critical inquiry Feminism Postmodernism <i>etc.</i>	Grounded theory Heuristic inquiry Action research Discourse analysis Feminist standpoint research <i>etc.</i>	Interview Focus group Case study Life history Narrative Visual ethnographic methods Statistical analysis Data reduction-n Theme identification Comparative analysis Cognitive mapping Interpretative methods Document analysis Content analysis Conversation analysis <i>etc.</i>

*Note:* From *The Foundations of Social Research: Meaning and Perspective in the Research Process* (p. 5), by M. Crotty, 1998, Sidney, Australia: Allen & Unwin.

While Guba and Lincoln (1994) argue that each paradigm allows only a reduced set of methodologies, for Crotty (1998), any paradigm (that he subdivides into epistemologies intertwined with their corresponding theoretical perspectives) can use any methodology and method(s). Crotty argues that in combining the four elements, the only restrictions relate to the fact that positivism (and post-positivism) is objectivist, phenomenology is constructionist, and postmodernism cannot be objectivist. This idea seems to correspond with proponents of the Glaserian school of GT, who claim that GT is merely a tool that can be used independently of the researcher's philosophical underpinnings (see Glaser, 2005; Urquhart, 2013).

For example, in Biaggi's (2014) dissertation, the philosophical positioning was described as follows (p. 38):

*From Crotty's (1998) epistemologies, I embrace an objectivist epistemology. I believe that "things exist as meaningful entities independently of consciousness and experience, that they have truth and meaning residing in them as objects ('objective' truth and meaning, therefore), and that*

*careful (scientific?) research can attain that objective truth and meaning” (Crotty, 1998, pp. 5-6). God created everything that exists, knows it all, and gives us the opportunity to know some of it (Prov 1:7; 2:6; GNT). Hence, as a result of earnestly seeking God’s wisdom, God can help humans understand “what is right, just, and fair” (2:9), and that knowledge holds power to “prevent . . . [people] from doing the wrong thing” (2:12). From Crotty’s (1998) theoretical perspectives, I uphold a post-positivist perspective. Since we are fallible and imperfect humans, our findings must remain as probably true, until the day when God reveals the definite truth. As such, “assertions about reality must nonetheless be subjected as far as possible to critical consideration in an attempt to achieve the best possible understanding” (Brand, 2009, p. 438).*

## **Types and Sources of Data**

In GT, “all is data” (Glaser, 2007, p. 1). Thus, any information that is useful for developing the emergent theory should be included as data. This paper describes three sources of data commonly used in GT: interviews, literature, and survey.

## **Interviews**

Interviews are the principal method of data collection used in GT (Birks & Mills, 2015). As recommended by Birks and Mills (2011), the interviews should be flexible, varying in content and format within and between interviews. Since “less structure is better from the perspective of following where the conversation takes you” (Birks & Mills, 2015, p. 75), the interviews are recommended to be unstructured. Glaser (2013) argued, “preconceived interview guides and questionnaires block emergence with a pre-framed thought about the way it should be” (p. 4). In addition, reflecting and taking notes help correct mistakes in subsequent interviews (Birks & Mills, 2015).

The interviews can be synchronous, by telephone, or video conference (Scott, 2011), and can be one-on-one or by groups (Hernandez, 2011). Though Glaser (1998) normally opposes the recording of interviews (for being inefficient and preventing a focus on conceptualization), he acknowledges situations where it can be the only way to collect data (Nilsson, 2011). We took Birks and Mills’s (2011) advice for novice researchers and fully recorded the interviews. As it is recommended in most qualitative research studies, audio-recording an interview helps the researcher focus on the actual interview, knowing that a device is

recording. It also helps with transcription, which is done verbatim. However, the researcher should be aware that it can be more difficult to code from transcripts than it is from field notes; the former can bury the patterns in their detail. In addition, the mixing of QDA (Qualitative Data Analysis) and GT methodologies has the effect of downgrading and eroding the GT goal of conceptual theory (Glaser & Holton, 2004).

If possible, it is important to cite authors in the field of study who call for in-depth interviews. For instance, Biaggi's (2014) study answered calls of some researchers in the business ethics discipline (e.g., Badaracco & Webb, 1995; Brand, 2009; Poole, 2009) who suggest greater attention to questions that are answerable within a qualitative approach, taking into consideration the situated and contextual nature of business ethics knowledge. In addition, this study answered calls to more transactional and constructed findings, more than collecting a "limited, truncated and artificially concise response" (Brand, 2009, p. 447). After interviewing 30 young managers, Badaracco and Webb (1995) suggested the use of in-depth interviews rather than questionnaires "for understanding the role of business ethics in organizations and for making it more effective" (p. 25). Similarly, in the subfield of corporate codes of ethics, some researchers give credit to in-depth interviews (Bryman, 2003; Helin & Sandstrom, 2007; Kitson, 1996; Schwartz, 2001; Snell, Chak, & Chu, 1999). Brand (2009) also highlights some of the advantages of in-depth interviews for business ethics research: (a) allow the researchers to raise issues that were not expected and that would not have been included in a closed-question questionnaire, (b) enable to grasp the context of responses, (c) permit insights into a respondent's perceptions and analysis, (d) offer seeing complexities and nuances, (e) allows capturing significant *penumbra* of the interaction—the way a respondent reacts to a question, (f) enable probing misunderstandings (cultural or language), and (g) offer a broader picture of the respondent's understanding of a matter.

Interview questions should not be guided by the literature review, but should intend to seek the participants' ideas (Glaser, 1998). Thus, the use of fairly unstructured and neutral questions is critical to ensure that data collection is guided by the data and not by preconceived ideas (Elliott & Higgins, 2012). Interview questions can then progressively become more theoretically focused as categories emerge (Higgins, 2007). Thus, the inductive approach is assured (Glaser, 1998).

## Literature Review as Data

Since Glaser (2007) argues that “all is data” (p. 1), the literature review is also considered data. In GT, literature is not revered, and its relevance for the theory is treated as with any other type of data (Glaser, 1998). Theoretical sampling and subsequent analysis guide the selection of the relevant literature to be used as data (Birks & Mills, 2015), leading to a possible increase in its use as the study advances (Dick, 2000).

Glaser (1998) is very strong in arguing that in GT, the literature review in the substantive field should not be done until the new theory has emerged. At that stage, the literature is “woven into the theory as more data for constant comparison” (Glaser, 1998, p. 67). The existing literature is, therefore, not used as a foundational piece as seen in most research studies. It is used to develop the emergent theory.

Some GT experts argue that knowledge of existing literature is needed (Suddaby, 2006 Urquhart, 2007). To prevent forcing the emerging theory to fit existing theories, Suddaby (2006) proposes reviewing several disciplines that reflect the topic under study, instead of focusing on a single substantive area.

On the other hand, Glaser (1998) strongly recommends not doing a literature review in the substantive discipline until the grounded theory has emerged for six reasons. First, existing concepts that may not be relevant to the emergent theory may affect the researcher. Second, irrelevant problems may derail the researcher from what is important. Third, the researcher may begin speculating about relationships that may not fit the data, neglecting that GT provides its own interpretations. Fourth, the experts in the field may awe the researcher, hence diminishing his or her theory-building ability. Fifth, the researcher may begin using existing jargon instead of using the emergent theory’s jargon; thus jeopardizing his or her theoretical sensitivity. Last, since relevant literature is only known after the new theory emerges, precious time may be wasted reviewing the wrong literature.

Following the Glaserian school, we recommend that the relevant literature is determined after the GT emerges, and be used as additional data for constant comparison purposes, as proposed by Glaser (1978, 1998). Besides, since in a GT, “theory is readily modifiable” (Glaser, 1998, p. 77), literature indeed helps to develop new categories and properties. Glaser (1998) suggests that the writer should “show yet more properties of categories, inaccuracies, supports, a broader view, syntheses and transcendencies” (p. 207). Conducting a thorough literature review before building the new theory from other sources of data, as is done in other research designs, is therefore not advantageous to the GT researcher.

## Survey

A survey can also be used for data collection, although this method may not be too common to many qualitative researchers. For example, a researcher that finds an emerging category in his or her study may decide to run a short survey on that category. Surveys might also be helpful for use in theoretical sampling. However, it may not be advised in the early stages of GT, because it can preconceive the researcher (as explained above).

## Data Analysis and Treatment

In GT, the aim of discovery and generation of “new categories and their properties, instead of being forced to use received concepts” (Glaser, 1998, p. 133) is achieved through the method of constant comparison. “Constantly comparing develops in the analyst a clear, focused flexibility to keep transcending his own and other analyses until he theoretically saturates his problem” (Glaser, 1978, p. 15). This section describes coding methods, units of analysis, the core category, and the ethical considerations relevant to a GT study.

## Coding Methods

There are six different coding methods used in GT (open, initial, selective, axial, focused, and theoretical coding). Even though different GT authorities use these methods differently, most of them agree in using three coding phases. These phases are described in Table 2. Although there are different methods available, we will describe Glaser’s (1978) open, selective, and theoretical coding methods.

Table 2. Coding Phases and Coding Methods

	<b>Initial coding</b>	<b>Intermediate coding</b>	<b>Advanced coding</b>
Glaser & Strauss (1967)	Coding and comparing incidents	Integrating categories and properties	Delimiting the theory
Glaser (1978)	Open coding	Selective coding	Theoretical coding
Strauss & Corbin (1990, 1998)	Open coding	Axial coding	Selective coding
Charmaz (2006)	Initial coding	Focused coding	Theoretical coding

*Note:* From *Grounded Theory: A Practical Guide* (p. 116), by M. Birks & J. Mills, 2011, London, UK: Sage.

*Open* coding is the initial data splitting into code segments (Saldaña, 2009), with the aim of comparing incidents (Glaser & Strauss, 1967). Glaser (1978) describes it as “coding the data every way possible” (p. 56), with the objective of not closing any possible future direction that the theory may take (Urquhart, 2013). These initial codes point to what is important, and suggest directions for analysis (Urquhart, 2013). Most key GT proponents recommend a line-by-line first round of coding, as a means of freeing from preconceptions (Charmaz, 2006; Glaser, 1978; Strauss, 1987). Glaser (1998) recommends asking the data the questions, “‘What category does this incident indicate?’ or ‘What property of what category does this incident indicate?’ and lastly ‘What is the participant’s main concern?’ As categories get generated, the next incidents are compared to the category which yields properties of the category” (p. 140). These questions help the researcher to keep his or her theoretical sensitivity, to move beyond description, and to focus on patterns that produce codes (Holton, 2007). For example, we will show one transcript snippet and the open code assigned from Biaggi’s (2014) study. Be aware that all transcripts are verbatim, and that syntax or grammar mistakes were intentionally not fixed.

*And it is sad. We have many cases which it is not, how to say, addressed at all. People speak behind the hand. But some of them are still in function, and nobody goes deep to clarify those things, because also leaders like more the peace than to be challenged or challenge others. (FN, Vol. 4, p. 6)*

This piece of data was considered a code segment, and it was initially assigned the open code *nobody is willing to speak/challenge*, a code that we previously thought to possibly help develop a category of the process of misbehavior. Codes are called *in vivo* when it contains words quoted from the participants; which help to minimize being influenced by literature, and keep the focus on their perspectives (Elliott & Higgins, 2012). The use of *in vivo* codes and the suspension of the review of literature until the theory has emerged to help keep the view of the participants throughout data analysis (Elliott & Higgins, 2012). Later in the analysis, when the grounded concepts begin emerging, the initial codes are modified, refined, and verified, so that the best fitting concepts are selected (Elliott & Higgins, 2012). In the example given above, the code was later refined into an *organizational culture/overlooked*, a code that would help develop a category of the antecedents of misbehavior, rather than the process.

The objective of *selective* coding is to link codes to emerging categories that will eventually contribute to the theory (Glaser, 1978). Hence, *open* codes are

grouped into categories and subcategories, or into properties and dimensions of categories, according to the research problem (Urquhart, 2013). Glaser (1978) recommends staying within the boundaries of the discipline when coding not to be led away from the research problem. For Urquhart (2013), *selective* coding starts when no more new open codes are found, and themes start to emerge which may rearrange the data in different ways, raising the analysis from a descriptive to a more abstract form. The constant comparison of categories and their relationships ensure that they are fit and relevant for both previous and new data (Glaser, 1978). Continuing with the example of the previous paragraph, the open code *overlooked* became one of the codes grouped under the label *lack of policy enforcement*, which became one of the three properties of *organizational culture*, one of the four subcategories of the category *opportunity*.

The objective of *theoretical* coding is theoretical integration; that is, “The pulling together of the abstract theoretical scheme into a final grounded theory” (Birks & Mills, 2015, p. 176). Thus, theoretical coding involves connecting the different categories (Urquhart, 2013). Theoretical memos play a critical role in this coding phase, as the researcher grasps and takes notes of links between the codes and categories (Urquhart, 2013). Again, to ensure a GT, this process is not linear but requires returning to previous coding stages (Birks & Mills, 2015). Though Glaser (2005b) recommends using any relevant theoretical code from any discipline, Urquhart (2013) recommends researchers to create their own coding families, while remaining true to the data. In addition, Charmaz (2006) recommends that the researcher be especially aware of preconceived theories, be objective, and reflective during theoretical coding, to refrain from forcing categories to fit existing theories, as well as moving beyond description into theorizing.

Relationships between categories can be found in other categories, the literature, and coding families (Urquhart, 2013). First, a category may be actually conceptualizing a relationship between other categories. Second, literature may aid in providing links between categories. Urquhart (2013) offers an interesting list of semantic relationships that may help in the linking of categories: “is a kind of, is a part of/a place in, is a way to, is used for, is a reason for, is a stage of, is a result/cause of, is a place for, is a characteristic of” (p. 43). Third, Glaser’s (1978, 2005) coding families may aid in relating categories to each other (e.g., process, dimension, type, strategy, frames, and causal families). During the sorting of the theoretical memos, theoretical codes in Biaggi’s (2014) study emerged in the form of propositions. For instance, the relationship between *self-control* (the core category), and *rationalizations* (one of the categories of antecedents of

misbehavior) emerged as *enables healthy* (based on theoretical memo 751). Thus, the proposition *self-control enables healthy rationalizations* was created. Glaser (1978) suggests “in all 10 to 15 codes are typically enough for a monograph on a parsimonious substantive theory. . . . Over coding is unnecessary. Too many codes dilute the impact of core and near core ones, and add only minor variations” (p. 71). Biaggi’s (2014) GT had 11 theoretical codes and propositions.

### Units of Analysis

Normally, there are three units of analysis: concepts, categories, and propositions (see Figure 1). *Concepts* are the conceptual labels used in initial open coding. *Categories* are the higher order and more abstract codes that similar group concepts generated during the selective coding phase in preparation for the emergence of the new theory. After theoretical coding, *propositions* describe conceptual relationships between categories and their concepts, as well as relationships between categories.

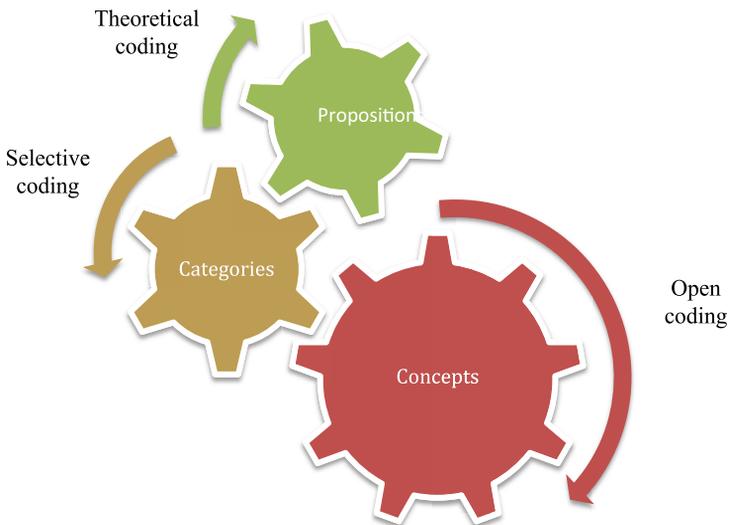


Figure 1. Units of analysis and coding methods.

*Note.* From *Grounded Theory: A Practical Guide* (p. 13), by M. Birks & J. Mills, 2011, London, UK: Sage.

## Identifying the Core Category

In GT, the solution to a problem under study becomes the core category. How the participants resolve their main concern is often the core category.

Grounded theory tries to understand the action in a substantive area from the point of view of the actors involved. This understanding revolves around the main concern of the participants whose behavior continually resolves their concern. Their continual resolving is the core variable. It is the prime mover of most of the behavior seen and talked about in a substantive area. It is what is going on! It emerges as the overriding pattern. (Glaser, 1998, p. 115)

How do we determine which variable is the core category? Glaser (1978) offers 11-items criteria to identify the core category. Table 3 provides a summary of these 11 items. They are exemplified in Biaggi's (2014) study below.

Table 3. Criteria to Discover the Core Category

Criteria	Definition
1. Centrality	It "is related to as many other categories and their properties as possible and more than other candidates for the care [ <i>sic</i> ] category . . . . It indicates that it accounts for a large portion of the variation in a pattern of behavior" (Glaser, 1978, p. 95).
2. Frequent reoccurrence	"By its frequent reoccurrence [ <i>sic</i> ] it comes to be seen as a stable pattern and becomes more and more related to other variables" (Glaser, 1978, p. 95).
3. Longer saturation	"It takes more <i>time to saturate</i> the core category than other categories" (Glaser, 1978, p. 95).
4. Quick connections	"It relates meaningfully and easily to other categories. These <i>connections</i> need not be forced [ <i>sic</i> ], rather their realization <i>comes quick</i> and richly" (Glaser, 1978, p. 95).
5. Grabbing implication for formal theory	"A core category in a substantive study has <i>clear and grabbing implication for formal theory</i> " (Glaser, 1978, p. 95).
6. Carry-through	"It does not lead to dead ends in the theory nor leave the analyst high and dry, rather it gets him through the analyses of the processes he is working on, by its relevance and explanatory power" (Glaser, 1978, p. 96).
7. Completely variable	"Its frequent relations to other categories makes [ <i>sic</i> ] it highly dependently variable in degree, dimension and type. Conditions vary it easily. It is readily modifiable though these dependent variations" (Glaser, 1978, p. 96).

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8.	Dimension of the problem	“While accounting for variation in the problematic behavior, <i>a core category is also a dimension of the problem.</i> Thus, in part, it explains itself and its own variation” (Glaser, 1978, p. 96).
9.	Prevent not-fitting core	Core categories “tend to <i>prevent two other sources of establishing a core</i> which is not grounded, but without grounding could easily occur: (1) sociological interest and (2) deductive, logical elaboration. These two sources can easily lead to core categories that do not fit the data” (Glaser, 1978, p. 96).
10.	Appears to be everywhere	“The analyst begins to <i>see the core category in all relations, whether grounded or not,</i> because it has so much grab and explanatory power. This logical switch must be guarded against, while taking it simultaneously as a positive indicator of the core” (Glaser, 1978, p. 96).
11.	Theoretical code	“The core category can be <i>any kind of theoretical code:</i> a process, a condition, two dimensions, a consequence and so forth.” (Glaser, 1978, p. 96).

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*Note:* From *Theoretical Sensitivity: Advances in the Methodology of Grounded Theory*, by B. G. Glaser, 1978, Mill Valley, CA: Sociology.

In Biaggi’s (2014) study, the category “self-control” for instance fulfilled Glaser’s (1978) 11-items criteria for core categories seen in Table 3. First, self-control played a central role, connecting with all other categories while accounting for the larger portion of variation in the latent pattern of misbehavior. Second, since self-control continuously reoccurred in the data that it became a constant pattern that increasingly related to other categories. Third, it required a longer time to saturate than the rest of the categories. Fourth, its relationship with other categories emerged easily and meaningfully. Fifth, the theory of self-control could easily be extended to become a formal theory of how individuals make value-laden choices in general. Sixth, it helped to carry-through the research process, because it was relevant and worked to describe what was happening in the field. Seventh, the variability of self-control depended upon variations on other categories. Eighth, while self-control explained why misbehavior occurred, it was also part of misbehavior. Misbehavior happens because the individual chose to misbehave. Ninth, the emergence of self-control as core category prevented the emergence of less-fitting core categories such as culture, or organizational factors. Tenth, after self-control emerged as the core category, it started recurring

everywhere in the data analysis. Last, self-control was a theoretical code formed by two dimensions. Therefore, self-control was the core category was considered the core category.

## CONCLUSIONS

It is our hope that this manuscript has helped make GT a little clearer for those interested in it, especially those new to GT. Just like most innovations, the first product may not always come with the clearest instructions. This is true also with the Glaserian GT for many people. This manuscript is an attempt to clarify important GT concepts for qualitative researchers to understand GT better and thus implement it more effectively and efficiently. This manuscript is in no way exhaustive in the discussion of GT, although we consider it a good overview. Readers are therefore encouraged to dig deeper by reading pillars of GT depending on the GT school they find interesting and attractive to them. We encourage qualitative researchers to follow the guidelines of GT carefully when conducting a GT study as it has specific traits unique to it, not found in other qualitative research designs. Without proper reading, learning, and understanding of GT, researchers should preferably avoid using it because such an undertaking could lead to an unfounded GT report. Readers of this manuscript are also encouraged to read published GT studies in reputable journals such as *The Qualitative Report* and *Grounded Theory Review: An International Journal*.

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