

Kazimierz Dobrowolski’s Integral Method as a Theoretical and Methodological Proposal of Organization and Management Research in Historical Perspective

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Submitted: 21.11.2019 | Accepted: 10.04.2020

Abstract

Purpose: The main purpose of the present paper is to present Kazimierz Dobrowolski’s integral method treated here as the proposal directed at the organization and management research in historical perspective. This method has been put forward against a background of the dominant – in the sciences of organization and management – quantitative approaches based on the positive research paradigm. His methodological proposal was referred to the main threads in methodological discussions of organizational history.

Design/methodology/approach: The analysis was based on studies of literature on the methodology of organizational history and theoretical proposals found in the publications of Dobrowolski.

Findings: The article shows that that Dobrowolski’s methodological proposal offers an integral method assuming a holistic nature of social reality, postulating a combination of functional and historical approaches as well as the use of materials obtained through field research and document studies.

Research limitation/ implications: Dobrowolski’s concept can be applied to the study of transformation processes and relations between organization and its environment.

Originality/value: The article is a pioneering attempt to analyze Dobrowolski’s theoretical and methodological concepts in the context of methodological postulates of organizational history.

Keywords: Kazimierz Dobrowolski, organization research, historical perspective.

JEL: A14, N01; N80

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Suggested Citation: Górski, P.T. (2020). Kazimierz Dobrowolski’s Integral Method as a Theoretical and Methodological Proposal of Organization and Management Research in Historical Perspective. *Problemy Zarządzania (Management Issues)*, 18(2), 55–68. <https://doi.org/10.7172/1644-9584.88.3>.

Metoda integralna Kazimierza Dobrowolskiego jako teoretyczna i metodologiczna propozycja badań organizacji i zarządzania w perspektywie historycznej

Streszczenie

Cel: głównym celem niniejszej pracy jest przedstawienie metody integralnej Kazimierza Dobrowolskiego traktowanej tutaj jako propozycja ukierunkowana na badania organizacji i zarządzania w perspektywie historycznej. Metodę tę przedstawiono w opozycji do dominujących – w naukach o organizacji i zarządzaniu – podejść ilościowych opartych na pozytywnym paradygmacie badawczym. Jego propozycja metodologiczna została odniesiona do głównych wątków w metodologicznych dyskusjach historii organizacyjnej. **Projekt/metodologia/podejście:** analiza została oparta na studiach literaturowych dotyczących metodologii historii organizacyjnej oraz propozycjach teoretycznych zawartych w publikacjach Dobrowolskiego. **Ustalenia:** autor pokazuje, że propozycja metodologiczna Dobrowolskiego, oferując metodę integralną przyjmującą holistyczny charakter rzeczywistości społecznej, postuluje połączenie podejścia funkcjonalnego i historycznego, a także wykorzystanie materiałów uzyskanych w wyniku badań terenowych i badań dokumentów.

Ograniczenia/implikacje badawcze: koncepcję Dobrowolskiego można zastosować do badania procesów transformacyjnych i relacji między organizacją a jej otoczeniem.

Oryginalność/wartość: artykuł jest pionierską próbą analizy teoretycznych i metodologicznych koncepcji Dobrowolskiego w kontekście metodologicznych postulatów historii organizacyjnej.

Słowa kluczowe: Kazimierz Dobrowolski, badania organizacji, perspektywa historyczna.

1. Introduction

Research carried out in the domain of organization and management – as often declared by some researchers themselves – is of interdisciplinary nature. However, the latter may display multi-faceted aspects. For one thing, the interdisciplinary nature stemming from the very essence of one object of discourse (being investigated into) along with a tradition of scientific reflection does not indicate that contemporary researchers in one domain will necessarily resort to theoretical concepts, results of studies and publications of some representatives of cognate and related domains of research. In Poland, sciences related to organization and management studies, due to their provenance and their subject matter, are closely related to sociology. They all take advantage of methodological output of sociology, especially its methods and survey techniques.

In recent years, Polish sociology has experienced some invigoration of research activities taking recourse to quality methods for which Krzysztof Konecki and the periodical “Przegląd Socjologii Jakościowej” must be greatly credited. The growing interest in the application of these research methods in the domain of organization and management studies has been visible as well. It is a historical perspective which is of particular interest among them. But inspirations in this respect come mainly from publications and literary output of contemporary Western researchers. A perusal of the

latter's publications makes those researchers, who are versed in the classics of Polish sociology, see that some motifs (found in our native researchers) do relate and correspond to contemporary methodological discourses and can adequately be applied to current research. It is Kazimierz Dobrowolski – a sociologist, ethnographer, and founder and creator of an integral method and theory of spontaneous processes – who can serve as the best example here. He integrates a popular ethnographic approach in contemporary organization research with application of given sources of historical nature which is an outcome of the assumptions of a historical base theory.

The paper will present methodological and theoretical proposals found in the publications of this Cracovian sociologist. The proposals in question will be introduced by a defining description of methodological approaches in the domain of organization and management research, as well as the disputes led in the circles of Western researchers representing historical orientation in organization studies. The article is a pioneering attempt to analyze Dobrowolski's theoretical and methodological concepts in the context of methodological postulates of organizational history.

2. A Brief Characterization of Methodological Approaches in the Sciences of Organization and Management in Poland

The authors who focus on methodological issues in the domain of organization and management sciences underscore the fact that the studies in question belong to empirical sciences, to wit, they recourse to induction as far as their research methods are concerned. A close reading of publications within this domain reveals the fact that a dominant research method applied by the authors of the analyzed texts is a public opinion survey and a questionnaire (Zdonek & Hysa, 2017). However, the financial and organizational justification in regard to the popularity of that method – as we find it exposed by these two women researchers – is hardly convincing. It rather testifies to a consideration of one, less important aspect of research, to wit, the aspect related to a realization of research, disregarding both the nature of investigated phenomena, and ontological and epistemological issues, which may be the cause of a considerable limitation of analyzed phenomena and their reduction to the domain of particular, individual beliefs and convictions and/or it may lead to unjustified, unsubstantiated, conclusions (based on opinions and convictions of respondents) with regard to structural organization traits and the relations between them (Górski, 2014b). The popularity of the survey method illustrates generally the domination of quantity methods applied in organization and management research. The above-mentioned regularity may stem from a leading and overpowering position of the positivistic paradigm, following the rules of natural sciences, and perceiving the organization reality in terms of measurable categories.

Although it is the positivistic paradigm that dominates in organization and management research related to quantity approach (Czernek, 2015, p. 172), the significance of quality methods (generally not limited to social sciences but applicable both to organization and to management sciences as well) has been noted in recent years (Czarniawska, 2011; Kostera, 2008). This turn to qualitative methods has been performed in terms of such aspects of the social reality in which men endow meanings on their activities and the ambient world. The application of qualitative methods was supported by such sociological theories as those represented by constructivists as well as by the sociological tradition, e.g. humanistic sociology underscoring an interconnection of social facts with activities and life experiences of concrete individuals. From the above stemmed the postulate of submitting to analysis such facts which are viewed from a particular perspective which happens to coincide with the perspective of those individuals. Introducing qualitative methods to the Polish sciences of management and organization has been related to emphasizing a certain novelty. This was the fact to which the editors of periodicals (devoted to those methods) paid special attention (Glinka & Kostera, 2011).

Although in recent years in Poland one can notice a significantly growing interest in qualitative methods applied to the domain of organization and management sciences, there has been a very weak response to the historic turn which was accomplished in organization studies (Booth & Rowlinson, 2006; Górski, 2007a). It is the result of both the specificity of prevalent research approaches in Polish organization and management studies which pay little attention to the importance of long-lasting processes and the weakening role of history in the education of economists and managers. In contradistinction with Polish sociology (drawing upon the historical approach referring to both native and foreign accomplishments (Kwaśniewicz, 1982; Sztompka, 1988)), the approach in question is hardly noticeable. Among few publications whose authors take up the ideas of the history of organization concepts, one finds mainly presentations devoted to discussions of representatives of science and praxis of management and their accomplishments (e.g. Czech, 2009; Sobczak, 2012). The second group is constituted by those publications which have been devoted to the analysis of the chosen organization methods developed by Polish researchers. The third group consists of the publications whose authors enter into the sphere of business history (e.g. Ochinowski, 2013; Jastrząb & Wawrzyniak, 2017), while the last group comprises all publications undertaking methodological issues (e.g. Górski, 2014a). The first Polish publications taking into consideration the native traditions in business history are also worth mentioning (Ochinowski & Szukała, 2015; Pikos & Olejniczak, 2017).

3. The Main Motifs of the Discussions Led in the Milieu of Organization Historians

The so-called historic turn in the organization studies (Booth & Rowlinson, 2006) appeared in the 1990s. It consisted in questioning the predominant structural and functional paradigm whose main trait was ahistoricism. Not only did the historic turn consist in a protest against universalism and presentism but also in turning one's attention to the necessity of carrying out organization and management studies in view of the historical context of organization. Until then such research (considering the historical dimension) had been carried out within the framework of business history. The prominent representative of this subdiscipline was Alfred D. Chandler, who tried to combine historic studies with the economic theory as a result of which important publications were developed. The latter are devoted to relations between strategies of the firm and its structure (Chandler, 1990/1962) and the transformations in the management of organizations in the managerial capitalism under the circumstances of the separation of ownership and management (Chandler, 2002/1977).

In spite of criticism procured within the framework of business history (Kieser, 2002; Musacchio & Mutch, 2013), the business history flourished in other countries than the U.S.A., and expanded its research scope (Amatori & Jones, 2003). Among objections raised against some of the researchers in business history, one argument seems to have gained considerable importance, to wit, the lack of theoretical reflection. That is why in recent times researchers have paid attention to relations between organization and methodology of historical studies (Kipping & Üsdiken, 2008; Decker, Kipping, & Wadhvani, 2015; DeJong, Higgins, & van Driel, 2015; *Debating Methodology in Business History*, 2017; Maclean, Harvey, & Clegg, 2017). Much wider materials have been submitted, not only limited to the archives of the analyzed organization and various theoretical concepts, such as historical institutionalism, Bourdieusian social theory, Foucauldian theory of power. The researchers of historical orientation laid down concise methodological chapters devoted to the studies making recourse to historical perspective – aimed at meeting the needs of students and researchers in the domain of organization studies (Wadhwai & Decker, 2017; Kipping, Wadhvani, & Bucheli, 2014; Rowlinson, 2005).

Such factors as development of the studies in organization culture, development of critical theory of organization, and postmodernist philosophical ideas (Weatherbee, 2012, p. 212) had an impact on growing interest in the recourse to making use of historical perspective in organization studies. This led in turn to the formation (apart from business history) of a new orientation in organization studies to which some researchers refer as organizational history (Godfrey, Hassard, O'Connor, Rowlinson,

& Ruef, 2016), while others as historical organization studies (Maclean, Harvey, & Clegg, 2016). Discarding those terminological considerations, I shall turn my attention to recent discussions concerning the relations between theories of organizational and historical studies.

While in the initial stage of the historic turn some researchers underlined the importance of historical material in the verification of organization theory, in recent years researchers have come up with the proposal of theoretical concepts utilized in the domain of organization studies which can be found applicable in the historical organization studies. British researchers point to two approaches noticeable in relations between organization studies and historical research (Godfrey et al., 2016). The former is described as “history with theory”. It consists in carrying out research within the framework of business history while juxtaposing it with organization theory applicable in the inter-relation of the gathered material in the course of research. The representatives of that approach tend to continue their studies within the historiographic current. The second approach – referred to as “theory with history” – is of a more theoretical character as it is the organization theories which constitute a starting point in their studies whilst the historical material is used to verify the hypotheses and to give answers to the questions posed. It should be borne in mind that in both cases history in itself is understood as “meaningful” while organization history is treated as a subdiscipline in organization studies.

Researchers emphasize the functions that history plays in organization studies. Maclean, Harvey and Clegg propose the 2 x 2 matrix to map out the historiographic theory into organizational paradigms. They distinguish four concepts of employing history in organization studies: history as an evaluation serving to test and improve existing theories; history offering explanation; history being helpful in theory development, i.e. history used to reveal social transformation processes; history as conceptualization serving to generate new theoretical constructions; and history as a narrative serving to explicate the form and origin of significant contemporary phenomena (Maclean, Harvey, & Clegg, 2016). Nowadays there appear fresh proposals of setting the conditions that regulate most of the requirements concerning historical studies and formulating conclusions based on organization theories. Harking back to classical historical institutionalism serves to take into account the contextuality of analyzed phenomena, to turn one’s attention to their localization as well as to phenomena and processes accompanying them (Suddaby, Foster, & Mills, 2014). British researchers, on the other hand, while analyzing the relations between historic theory and organizational theory, point to three epistemological dualisms (Rowlinson, Hassard, & Decker, 2014).

1. The duality in explanations – historians engage themselves in creating narratives while organizational theoreticians submit narratives for analysis.

2. The duality of argumentation – historians resort to verifiable sources while organization theoreticians prefer to refer to the data gathered in the very process of their research.
3. The duality in approach to time – historians construct their own periodization while organization theoreticians treat time as the constant for chronology.

All this allowed the researchers in question to distinguish four alternative strategies in the domain of organization studies:

- corporation history consisting in a unified and objectivist narrative of organization;
- analytically structured history, the narration of theoretically conceptualized structures and events;
- serial history consisting in application of standard techniques used in the analysis of recurrent facts;
- ethnographic history consisting in close reading of source documents in spite of previous “against the grain” rules.

All the differences between the above approaches concern the sources used by researchers, the way they arrange materials serving to explain the studied phenomena and the narratives presenting the established results. The aforementioned strategies illustrate the fact of the bulk and diversity of a possible application of historic perspective in organization studies. Quite recently, Peter Miskell (2018) put forward such a thesis distinguishing four types of research:

- meta-histories in which researchers aspire to create theoretical models based on the analysis of empirical cases regarded as the representative ones;
- case-histories in which researchers strive to create theoretical models but resort to the distinction of prominent qualities and the context of studied cases;
- integrative histories in which researchers analyze cases regarded as the representative ones, but their purpose is to identify historical trends;
- micro-histories in which researchers analyze complex reality of organizations focusing on its peculiarities and accompanying contexts. This model stands close to the one of ethnographic history distinguished by Rowlinson, Hassard, and Decker.

Thus these methodological debates (held in the milieu of the researchers taking advantage of historical perspective in management and organization studies) seem to turn attention to the following issues:

1. Making use of historical perspective in studies transcending organizations, in particular those related to social issues connected with their functioning;
2. Adjusting research methods to the way of defining the subject matter, i.e. to an organization, and making use of material sources;
3. Taking advantage of various theoretical concepts;

4. The necessity of considering the contexts of analyzed phenomena and processes.

In the following parts of the paper, those issues will be referred to Dobrowolski's methodological proposals.

5. Kazimierz Dobrowolski's Selected Methodological and Theoretical Ideas in the Context of Their Application to Organization and Management Research

Generally speaking, Kazimierz Dobrowolski is not widely known to the students of Polish contemporary social sciences, which may be due to the time distance marking off his academic activity. The scholarly output of this sociologist has been used by a group of his academic fellow travelers, which is reflected in the materials published in the framework of *Prace Komisji Socjologicznej PAN w Krakowie (The Polish Academy of Sciences Sociological Commission Proceedings)* in Kraków. We find him saying that the methodological issues he had been working on since the mid-1930s (Dobrowolski, 1969) were edited and published in the 1960s (Dobrowolski, 1966) and the 1970s (Dobrowolski, 1973), just in the period when monographic studies were about to be superseded by quantitative research, often based on attitude and opinion studies (Kwaśniewicz, 1999).

The integral method proposed by Dobrowolski comprises assumptions concerning the essence of social reality along with the ways and purposes of its analysis. It is a holistic approach emphasizing the complexity and historical dimension of social reality. The key notion of this concept is a historical background of both material and immaterial factors, quote: "political and legal units, ethical and aesthetical ideas, beliefs and convictions, philosophical systems, family life styles, and even our disposition and temperament" (Dobrowolski, 1967, p. 7). Social reality possesses a historical dimension. Dobrowolski held the opinion that all phenomena pertaining both to the past and present reality constitute parts of longer developmental chains. Those phenomena are the result of human activity, including multicultural relations and contacts, which is especially discernible in the studies of social transformations of the rural communities taking place in the second half of the 19th century and lasting until mid-20th century. That is why the author of the theory paid so much attention to geographical factors (not exposed at the time in the field of social sciences) related to spatial conditioning of contacts between various social groups. This emphasis on the historical dimension of social reality is accompanied by the tenet concerning a variable course and duration of the phases in developmental processes. Dobrowolski states bluntly that the periods, subperiods and developmental phases, established within the course of research, did not progress in the same

way in different parts of the worlds as they did in the Mediterranean and central or northern European countries (Dobrowolski, 1969).

According to Dobrowolski's theory, it is the historical background that exerts influence on (quote): "the social coexistence, the group sense of value cherished by upper classes, as well as the sense of degradation of lower classes". Thus the base affects the interaction processes between individuals and social groups, social ties and differences, all activities leading to cooperation or conflicts. Thus one can see that such holistic perspective of social reality corresponds with the methodological postulates put forward by the representatives of the historic orientation in contemporary organization and management studies. It can also be discerned in the studies of industrial teams of workforce, carried out by the Cracovian sociologist and his academic fellow-travelers. Dobrowolski developed research into mutual series of interactions between rural communities, which constituted the basis of recruitment of workforce formed and informed by the agricultural labor ethos observing traditional family and neighbor ties so drastically juxtaposed with a completely new environment of labor ruled by different logic which proceeded from the industrial production and labor organization, both affected by technological regime and the tenets of both political and economic system – its principles and praxis (Stojak, 1964, 1969; Dobrowolski & Stojak, 1969). This perspective makes the studies in industrial organizations and labor related to them transcend all narrow points of view which were rife both in management research and in classical studies in business history.

The theoretical assumptions concerning social reality correspond with outlined goals of the undertaken research pointing to some proposals with regard to their realization. The subject matter here is both an influence exerted by the social base on an actual condition of the social reality, the fact being related to the inter-relations between questions concerning both the provenance and functioning of the analyzed phenomena, institutions as well as all transformations of the very base. Getting to know the historical background not only allows for a better understanding of the present but for introducing changes as well. Filled with respect and appreciation of the importance of historical base, Dobrowolski is not a determinist, however. He was far from thinking that we are all determined by our past, weighing in on us like fate or doom, which is best substantiated by his studies in the cultural transformations in the age of Renaissance. Dobrowolski believes that the study of the historical background is especially important at the time of historical breakthroughs, e.g. the period of post-war transformations (Dobrowolski, 1967, p. 48). According to Dobrowolski, an integral presentation of the studied reality requires the researcher to take the following actions (Dobrowolski, 1966, pp. 64–65):

- a. Collecting all source categories in the most complete manner which can provide one with the versatile reconstruction and explication of problems and issues;
- b. Integral application of all methods and research techniques in so far as they are adequate and can contribute to deepening and ameliorating the scrutinized reality;
- c. Revealing all conditions influencing the emergence of the analyzed reality, and in particular the non-social conditioning;
- d. An integral perspective of all forces bringing about the dynamics of the transformations with particular emphasis on “clashing” the old and the new elements, of the instability of forces informing (shaping) courses of processes, of revealing the dominant forces leading to the birth of discordant processes;
- e. Aiming at embracing the distinguished socio-cultural domains in relations with all other domains and processes;
- f. The integral revealing of an overall function of the analyzed institution – the intentional and non-intentional functions;
- g. Figuring out the historical position of the given reality in a greater chain of development.

In the process of building up of theories, Dobrowolski postulates taking advantage of both individualized and generalized points of view, which is substantiated by the capability of integrating individual, repeatable facts into homogenous adequate classes, i.e. building up typologies. Dobrowolski regards the historical analysis as fertile and inspiring in so far as constructing of theories is concerned, for it is the historical analysis that provides not only the adequate data for formulating conclusions but proves and substantiates all theorems. The data implemented in theory building comes from diverse sources, from the analysis of given information coming from the past and the present, and finally from the field work, observations and polls. Dobrowolski attaches a great value and importance to all materials and data gathered in the field. As he has it: “Field materials gathered in the process of systematic, sustainable observations constitute the most valuable source basis – never ever to be replaced by extant, already given data. These materials enable one to perceive live community in its totality of the existential conditions, in relations and ties with nature, the soil (“the telluric sphere”), in the basic, both fundamental and extra means of bread-winning, sources of income, in its reactions to ever-changing means of production as well as in its socio-professional structure, its material culture, social organization – beginning with families and neighbourhood, through groups, hosts, throngs and larger territorial structures, in its axiological system, religious beliefs, ethical notions, moral evaluations, in its customary way of life, recreation, leisure time, art and musical folklore” (Dobrowolski, 1966, pp. 120–121).

That is why an adequate training, personal experience and authentic engagement on the part of members of the team of researchers are so

important in the preparation of field work. Not only does Dobrowolski emphasize the importance of the methodological acumen, technique and knowledge but also all the skills required to enter into the area of field work, the ability to win hearts and minds, and confidence of the examined subjects, convincing them as to the importance and value of the purpose of the research carried out. This question of the significance and value of knowledge about the social reality for social practice was clearly discernible in explaining the migration process after WW II both with reference to one country and its particular regions and the migration processes from rural areas to towns caused by industrialization (Dobrowolski, 1973).

One of the serious challenges facing the researchers resorting to the monographic method was the passage from empirical knowledge to substantiating the validity of generalization. For Dobrowolski, constructing theories and formulating generalizations were very important objectives. He tried to reach them through assigning great significance to the very choice of units to be made objects of research while taking into consideration their typicality through pairing up (“mating”) units of contrasting type of base. This aim has been realized by the panel research as well as methodological assumptions along with handling of the data not only focused on the full presentation, but also on the constructing typologies. Complying with the criteria of selection of individuals to be studied is clearly visible and felt in the study of migration from Małopolska to Western regions and in the study of the course of industrialization processes in the regions located on the two riverbanks of the Vistula river – the regions in the past belonging to different powers which had partitioned Poland (Dobrowolski, 1967, pp. 261–263). On the other hand, the methodological assumptions, procedures of analysis and handling of the data are visible in the studies of the spontaneous processes taking into consideration the analysis of environment in which both the spontaneous processes and phenomena are shaped while their classification and the explication of their causes and changeability form are provided for. The way of building theory based on empirical research postulated by Dobrowolski corresponds to what Miskell described as integrative histories.

6. Conclusions

The article presents theoretical and methodological issues related to the integral method proposed by Kazimierz Dobrowolski. This method has been characterized against the background of methodological discussions conducted by organizational history researchers and a brief description of research methods used by Polish organization and management researchers. I argue that many issues discussed nowadays by the researchers of organizational history can be found in the proposals presented by Dobrowolski. They concerned the recognition of the studied problems in a broader

social, cultural, political and economic context, awareness of the relationship between the phenomena belonging to these areas and the course of historical processes. Particularly noteworthy are the postulates for using various types of sources and for combining field research methods with the analysis of historical sources. Dobrowolski's considerations regarding the selection of research units and building a theory explaining these phenomena and processes are also worth reflection, which fits into the model referred to as integrative history.

Dobrowolski's concept was used in the study of mutual relations between the social environment from which the workers were recruited and their work environment. This is an area close to organizational studies and, therefore, can be recommended to Polish researchers of the phenomena and processes occurring in contemporary Polish organizations. It is a valuable perspective for analyzing change processes taking place in the long term, among which are the transformation processes of Polish organizations after the change of the political and economic system after 1990.

Acknowledgements

This research received no funds.

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