Guest Editorial – Historical Perspectives

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Human Resource Development Review's mission is no mystery. It exists to publish work that makes a theoretical contribution to the development of theory, the foundations of HRD and reviews of the relevant literature. The journal does not, however, publish work whose central focus is empirical findings, or empirical method and design. When the journal's Editor, Yonjoo Cho, invited me to guest edit that part of the anniversary issue that would be devoted to papers on the history of human resource development, the extent to which potential contributors found it difficult to imagine how to write history without a central focus on empirical findings was not yet obvious. There was, however, a substantial number of potential authors who were interested in how they could contribute historical articles to *HRDR*.

History, as defined by the aims of scope of the journal, is only one type of foundations of HRD that can be investigated. *HRDR* considers the concept of foundations to cover a wide range of possible contributions, that is, 'papers that … might address philosophies of HRD, historical foundations, definitions of the field, conceptual organization of the field, and ethical foundations' (sagepub.com). The problem being – from an outsider perspective – that there does not seem to be much, if any, debate about what constitutes the history of HRD in the US.

History of HRD

The history of HRD in the US is a distinctly 20th century phenomenon. Swanson et al. (2001) extended history reaches back to the ancient Greek and Roman era, and touches on the influences in public policy, education and management development in the US. However, it is clear from the detailed explanation of the figure and role of Channing Dooley that Swanson and Holton see HRD as a mid-20th century development. Indeed, Richard Swanson opened the recent AHRD Masterclass podcast: History and Foundation of HRD with just this HRD foundation narrative. The centrality of the 'Training Within Industry' (TWI) project at the end of the 1939–45 world war was stressed, as was its importance to the training and development framework in the US, and the connection to HRD as a performance improvement mechanism (see also Swanson, 2001). The TWI foundation story is also one that speaks to the development

of a field and research tradition within academia bound up, as it is, with the creation of the Academy of Human Resource Development. As I observed on the podcast at the time, this was obviously a well-known and accepted origin story, which – although it had points of contact with the development of HRD elsewhere in the world – did not speak to my own experience of HRD and might not do so to academics and practitioners outside of the US.

That is not to say the account is wrong. It is not. The factual base of that account is strong and convincing. But truth claims are interpretive, and facts exist only because normative choices have already been made and are presented within a particular framework of description (Clark et al., 2018). This is not to invite HRD down the hellish rabbit hole of *alternative facts*. Without a commitment to rigour and historical methodology there is, as Clark et al. (2018) acknowledge, only propaganda. A commitment to rational scientific discourse still allows for a plurality of true statements that can be discussed and revised in the cause of expanding our understanding of how HRD is practiced and theorised. Swanson's account of HRD and its founding is an example of *historiography,* that is, the previous historical writing and explanation on the subject (Wadhwani & Decker, 2017). But it is a historiography that is increasingly under challenge by scholars who find it narrow and exclusionary.

History, despite its range of methodological approaches, represents a challenge for the field of HRD given its disciplinary allegiance to the social sciences, especially where that allegiance is felt to be towards the quantitative social sciences. Each discipline has its own research practices, standards of evidence, rhetorical conventions and strategies. It has its own journals, core texts, associations and conferences which exist – in part – to create an internal labour market whose members train the next generation (Clark et al., 2018). The current historiography of HRD casts it as a field devoted to practice-based, problem-solving research connected to issues of productivity. One might also say that it self-identifies with social science as a *hard* discipline, that is, it claims a consensus about the field, publishes findings that build on previously accepted ones, using commonly agreed research methods, and conducts research to generate new discoveries and explanations in a linear form (Clark et al., 2018). These disciplining beliefs create a clear benefit in terms of publication, institutional positioning and career progression. However, these benefits predominantly accrue to scholars in the United States. Whether you believe HRD to be a field (e.g. Kuchinke, 2001), or a discipline of its own, it is one that is built mostly to service a specific, and geographically distinct, scholarly community.

In contrast, history is a *soft* discipline (Clark et al., 2018) and the boundaries of historical problems are unclear. History has little task certainty in respect of its research and the significance of research findings are difficult to establish. History's primary concern is to understand how things came about rather than the solving of problems (Clark et al., 2018). What would it mean for HRD to see itself as a site of practice that is available for historical interpretation? If we position HRD as a practice, and one that manifests quite differently in different times, places, and contexts, then it immediately becomes a more generous and accessible field of inquiry to those based outside the US,

and those within the US who have different disciplinary backgrounds. The careful consideration of HRD history, as Gosney and Hughes (2016) suggest will not just deliver a greater understanding of the past but 'a greater capacity at transparency in its current theory and practice' (p. 17). That greater transparency will be the direct result of critical historical approaches, that is, those studies that are interested in the history of race, gender, capitalism, empire (and many more politically informed perspectives). Critical historical perspectives also re-open debates about what HRD is, and its significance, across a wide range of settings in the 21st century.

How Can *HRDR* 'do' History?

Having (I hope) established a convincing case for more historical papers in *Human Resource Development Review*, we are still left with the issue that I mentioned at the start of this editorial. As a theory journal, how can *HRDR* 'do' history? The question has troubled me as much as it troubled prospective authors who approached the editorial team for advice. And I think it is useful to separate the question into two different strands about historical research and HRD more generally. The first reflects an anxiety about how to present historical method to a social science field, and the second is concerned with how social science methods can inform historical research.

In their discussion on how historical methods could inform organizational research, Booth and Rowlinson (2006) identify the common points of difference between history journals and social science publications. Historians are not usually asked to produce a methodological explanation – their copious footnotes re source material and archives do this work outside of the main text. Social scientists, in contrast, are expected to give a detailed account of their methods but are discouraged from detailing archive sources. Booth and Rowlinson (2006) were in favour of experimentation, and of accommodating different styles. However, it was clear from the review process for the special issue, that reference to historical methods and/or those outside the established social science norms, excited a great deal of reviewer concern. If more historical articles are to be encouraged, then the journal could usefully set out its expectations with respect to methods sections and start conversations with the editorial board about reviewer expectations in terms of writing between and across disciplines.

In terms of how social science methods might inform historical research, it is important to stress that there is ample scope for those without a background in historical method to publish historical HRD papers, including empirical papers. The scope for empirical studies is only constrained by the availability of source material. And although that is limited in respect of early- and pre-20th century institutions, there are richer seams to be mined in relation to the recent past. In addition, developments in the disciplinary approach to historical sources have made the analysis of archive material much more aligned to the quantitative social sciences (Ventresca et al., 2002). The move towards coding archive material as data, as opposed as the object of deep reading, brings organisational archive sources into the disciplinary competence of many HRD researchers trained in the social sciences.

The *new archivalist* approach as outlined by Ventresca et al., (2002), further develops the move towards measurement in historical methods, to link objects of investigation – such as structural embeddedness, meaning systems, repertoires of action and institutional logics – with source material ranging from exchange agreements, trade publications, emails, annual reports, to industry reports and procedural records, and the application of analytic methodologies such as network analysis, content analysis, multidimensional scaling, Boolean algebra, fuzzy sets, correspondence analysis and hierarchical classification models. My own practice in respect of historical HRD research is much closer to what Ventresca et al., (2002) characterise as the historiographic approach with its attention to detail, and what often amounts to an ethnographic study of an organisation or group through the medium of the archival records. Material is read and notes taken, but there is no attempt to measure or conduct quantitative analysis.

If you do not immediately see yourself as having an interest in historical work because it is too 'soft', you may find there is a historical approach out there that fits well with your existing methodological orientation and expertise. But for those readers who are here because they want to explore the historiography of HRD or to understand the historical embeddedness of HRD practice and theory, we need to return to the specific question of what might make a *HRDR* historical paper.

Below are three approaches – inevitably, often overlapping – that I think meet the *HRDR* publication criteria:

1) *Historiographical revision.* A paper that is based on archival sources, and is presented as a single case study, but whose principal aim is to question or revise the existing historiography of HRD, its current definitional range, or understanding of practice.
2) *Methodological or analytical evaluation.* A paper that examines the methods that have been used to construct the existing historiography of HRD or its current definitional range (e.g. documents, interviews, oral histories) and their effect on how the history of HRD is understood. Alternatively, a paper that accounts for the *presentist* confirmation bias in how HRD research frames its analysis, that is, a perspective that limits itself to present-day attitudes or beliefs when examining the past (Bill Cooke, personal communication, November 19, 2021).
3) *Periodisation of the field.* Research that is deployed in the attempt to establish or revise periods of HRD practice, theory, or development with the aim of problematising current paradigms (Bill Cooke, personal communication, November 19, 2021) and disrupting linear accounts of progress.

Three Approaches to *HRDR*'s Historical Articles

Historiographical Revision

The first approach is the most straightforward in that it allows for the inclusion of empirical research and is well-suited to studies based on a single organisation, archive,

or data source. Single organisation studies are often pursued alone or in small research groups and – in my experience – can often represent a 'lucky find' in terms of time spent looking through archival holdings, or smaller elements of a much larger project of the collected works and writings of an individual or organization. Amongst the papers selected for the Special Issue were two (Bohonos and James-Gallaway and Feng et al.) that were based on archival sources but whose main aim was not to showcase the specific organisation and individual. Instead, these two studies used the historical content to argue that our present understanding of HRD is insufficient.

The first paper, by Bohonos and James-Gallaway argues that the current historiography of HRD ignores the historical experiences of racially minoritized people and has centred white perspectives. The field therefore lacks the foundational work to build an adequate response to recent calls for racial inclusivity (Bohonos and James-Gallaway, forthcoming). The paper uses the autobiographical writing of Fredrick Douglass, a formerly enslaved African American. But the focus is not exclusively on Douglass but on the challenge that his work represents to HRD in respect of equality, diversity and inclusion initiatives and how they are framed in contemporary organization. It is an important paper to include in the Special Issue because it speaks to the absences and silences in the existing accounts of the history of HRD in the US, and because it demonstrates the extent to which critical approaches can use history to destabilise existing understanding of equality, diversity and inclusion training approaches.

The second paper in this category is by Feng et al. Feng and colleagues have taken one of those happy accidents of historical research and used one of the team's familiarity of Asilomar from a previous working life as the launching point of the argument that the history of HRD is too narrowly conceived. The YWCA – along with many other volunteer societies of the early 20th century – represent significant players in the development of work-appropriate skills in a non-work setting. As such, their paper challenges the current historiography and definitional base of HRD and argues for a broader vision.

Another possible version of a historiographical revisionist approach is to look to a historical exploration of a practice within HRD but whose principal focus is on revising our current understanding of how, and why, it has become a key practice. Papers in this tradition often use documentary sources as their empirical base (e.g. professional journals, professional association reports) but to be historical assumes a revisionist (Wadhwani & Decker, 2017), rather than teleological orientation (Cooke & Kumar, 2020). Put simply, the difference between a good summary of the development of a practice and a historical consideration of that same practice is the application of historical reasoning, and the avoidance of teleology. Historical reasoning is inherently revisionist. The researcher confronts an existing taken-for-granted explanation and offers an alternative one given their position in the constantly evolving present. The aim is not to fill gaps in theory but to revise, replace and challenge previous explanations and constructs (Wadhwani & Decker, 2017). The avoidance of teleology is seen in the

refusal to frame the past in terms of steady march of progress that brings us unproblematically to the present and onwards to an ideal future (Cooke & Kumar, 2020).

Methodological or Analytical Evaluation

This second approach is perhaps the most difficult to explain without an example to hand. I very much regret that we were not able to attract a contribution to the special issue that looked at the ways in which history is created and reinforced within the discipline. Again, my view as someone who researches outside of the Academy of Human Resource Development, is that it is an institution that is heavily invested in oral history as the main vehicle of creating and disseminating the history of the disciplinary field. Mechanisms such as awards for outstanding and distinguished scholars, and a Hall of Fame, suggest that there is a heroic, or great man (sic), approach to the field in play. The extent to which that approach both enables and constrains the way in which the history of HRD is written, promulgated and understood within the discipline is worthy of examination.

An *analytical* evaluation, in contrast, is interested in the ways in which a particular theory can shape a field and looks to establish why – and how – theories become influential in a particular discipline. Although papers of this type were shortlisted, none were able to be developed in time. Historical papers that examine the development of an idea are harder to write than you would imagine. Some of these difficulties speak to the challenge of periodisation of ideas, separate from periodisation of the field. But, in general terms, a paper that examines the history of an idea requires a sensitivity to, and understanding of, the specifics of the period(s) in which the idea is created, taken up and maintained. These may not be the same time periods, which always raises the question of what is it about the context that makes the ideas necessary and useful at that specific moment?

For example, this approach could generate a paper that explains the utility and tenacity of Becker's Human Capital Theory (HCT) in HRD. Human Capital Theory has been deployed to great (if regrettable) effect to shift the financial responsibility of many elements of work skill development from the organisation to the individual, yet there has been little by way of sustained examination of why this theory has been so influential in altering the discourse around investing in workplace development and education *across* time periods. Although Torraco (2016) touches on its importance, an examination of HCT – and a range of other core concepts and theories in relation to how they are deployed at point of origin and in current contexts – would be a useful contribution.

Periodisation of the Field

Periodisation, as Jordanova (2014) notes, is one of the most fundamental operations that historians undertake. Historians practical concern with time is because they are interested in those 'soft' disciplinary issues of how things come into being (Clark et al.,

2018). But given that there is no predictable pattern and pace to change and that change itself can be accelerated or impeded by external upheavals such as natural disasters, war and revolution, history is a collection of different periods. The assessment of change in a particular context – national development, regional identity, artistic endeavours, social attitudes, organisational forms, or developmental practices – and the naming of discrete time periods are basic historical tasks (Jordanova, 2014).

One of the curiosities of the currently accepted history of HRD is that it has no identified periods. Even if we accepted that HRD, as a discipline and workplace practice, commenced at the end of the 1939–45 war, we might expect to have been able to delineate periods of practice and theory over the last 75 years. The type of *HRDR* paper that brings us closest to the idea of periodisation is the literature review. However – and this brings us again to the concept of historical reasoning and of the resistance of teleological approaches – a study that is organised chronologically is not sufficient to qualify as 'historical' whatever its underlying intent. To be historical is to be contextual, and contextualisation is the interplay of narrative construction and periodisation. Periodisation of a field matters for explanation because variations in how time is divided up allows for different causal explanations, that is, short duration periods tend to favour explanations based on human agency and action, longer duration periods allow researchers to consider structural issues that shape action (Wadhwani & Decker, 2017). Chronological organisation of material or sources without periodisation tend to produce teleological and linear explanations that take us closer to the HRD understanding of theory building, than to historical reasoning.

Conclusion

I hope the examples outlined above help to generate more published historical papers in *HRDR*. The experience of putting a special issue on this topic has been both interesting and challenging. Whilst there was a sense that approaching HRD from a historical perspective was potentially exciting, it was also clear that the idea provoked uncertainty amongst *HRDR* authors. I was asked to use my editorial contribution to give additional guidance (and perhaps reassurance) to the *HRDR* readership as to what a historical paper in this journal might look like, and how it differed from the types of articles more commonly published.

What all the approaches outlined above have in common is that they are *evaluative* – they seek to use historical sources and historical reasoning to examine why and how particular theories and practices, current understandings and power relations (Wadhwani & Decker, 2017) within the field came about. History throws down a gauntlet. It challenges us to be in reflexive dialogue with the past. But, more importantly, it requires us to be in reflexive dialogue with each other as HRD scholars.

Linda Perriton
Stirling Management School, University of Stirling, Stirling, UK

ORCID iD

Linda Perriton https://orcid.org/0000-0002-9109-5767

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