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Introduction to Qualitative Methods

Lecture and Lab in Political Science MA Curriculum, University of Cologne
Module CM Qualitative Methods – 14335.0700 Lecture, 14335.0701 Lab

Summer Semester 2024

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Course Description

This course is intended to be a practical guide for how to do social science research at the Masters level using qualitative methods, complementing other courses offered on quantitative methods and general research design and research logic. We begin by understanding what qualitative research is, and why you might choose to use qualitative methods to answer specific research questions. This includes an overview of the sort of data that can be used in qualitative research. We then will discuss what a "case" is and methods for choosing an appropriate case or cases. With this foundation, we then will discuss some specific qualitative methods, namely process tracing, interviews, and grounded theory. We will conclude the semester by considering generalizability from qualitative case studies and practices of transparency that ensure qualitative methods are scientifically rigorous.

By combining the lecture with hands-on lab sessions, students will gain experience applying these research methods. Students will work in groups over the course of the semester to discuss the research design of qualitative case studies, collect and analyze qualitative data, conduct qualitative coding exercises in MaxQDA, discuss coding strategies and schemes, and conduct analyzing semi-structured interviews. Each student will contribute a portion to a group project with written assignments during the course, then the group will come together to present their results at the end of semester.

Schedule

All students are invited to all lecture sessions. Students are divided into two lab sections and should check which section they are registered for! Attendance in the first session (second week of the semester) is crucial, because this is when we will build the groups for the rest of the semester's work.

	Time	**Dates**	**Location**
Lecture	Thursdays 14:00-15:30	April 18; May 2, 16; June 6, 13, 20, 27	H112, IBW Building
Lab A	Thursdays 16:00-17:30	April 18; May 2, 16; June 6, 13, 20, 27	S100, IBW Building
Lab B	Fridays 12:00-13:30	April 19; May 10, 17; June 7, 14, 21, 28	S100, IBW Building

Objectives

After participating in the course, students will:

- Know the difference between qualitative and quantitative research and the trade-offs involved in choosing one approach over the other
- Learn the principles and practices of qualitative research design, case selection, grounded theory methods, and process tracing
- Be able to apply the logic of a scientific method when evaluating a qualitative research study
- Critically evaluate the methodological dimension of a qualitative study and be able to construct a research design of their own

Requirements

This course is evaluated via portfolio examination, meaning there will be several assignments that comprise the final grade. Students must complete all assignments to receive a passing grade. The assignments will be returned to the participants with comments and a grade following the scale below. Students are also expected to complete the readings each week.

During the course, the students will complete the following steps chronologically:

1. Form a group of four during the first lab session and choose an article from the pre-approved selection that the group will work with throughout the semester
2. Write individual parts of the written assignment and submit them via Ilias
3. Identify the data source(s) from the chosen article, then collect and verify as many as possible of them during the lab sessions
4. Use MaxQDA to code sources and come to an assessment about the conclusions presented in the article
5. Make a presentation about your group's work at the end of the semester, reflecting on each student's individual contribution
6. Submit the coding exercise and written evaluation of the evidence after course sessions end

Thus, the portfolio examination has three elements: a first written assignment, a presentation, and the coding exercise / evaluation of the evidence. These three components are detailed below:

Written Assignment (15 points)

Each student will submit a written assignment on the article their group chose. The assignment is a methods-focused discussion of one element from a published case study. Because the articles must fit certain criteria in order for the assignment to work, the instructors have identified a few pre-approved articles. All groups must choose one of these pre-approved articles to work on throughout the semester.

Each student will submit only one of the following four assignments. While each student will write their own assignment, when combined, the four pieces will provide a thorough review of the article and will be useful when compiling the final presentation. Group members will decide for themselves who will write each part. It is not permitted for two group members to write the same assignment. Each assignment should be 1000 words **excluding references**. Assignments should be uploaded to ILIAS. Additional details will be shared in class closer to the deadlines. The topics and deadlines are as follows:

Task	Deadline to submit
Substantive summary and theory	29.05.2024, 23:55
Case selection	29.05.2024, 23:55
Interpretation of Evidence	19.06.2024, 23:55
Case comparison	19.06.2024, 23:55

Presentation (15 points)

At the end of the semester, each group will present the results of their work. The presentation should be cohesive, but each member needs to present one part of it. Each student will be graded on their individual portion of the presentation. The presentations should nevertheless be prepared together to coordinate the style and avoid repetition. In total, each group's presentation should be no longer than 12 minutes. Presentation slides should be uploaded to ILIAS no later than 26.06.2024 at 23:55.

Coding Exercise (15 points)

Students will gain hands-on experience applying qualitative methods by coding the data from their chosen article in MaxQDA. This should not be confused with the type of "coding" that one does in R or another programming language – qualitative coding is a specific method that we will study and practice during the lab. The result will be an export from MaxQDA showing the way the student applied this method to the data from their group's article. This report shall be accompanied by an evaluation of the strength of the article's empirical analysis, based on the student's review of the data. The evaluation should be no longer than 1000 words and should be uploaded to ILIAS along with the MaxQDA report by 29.07.2024, 23:55.

Grading Scale

These three assignments total 45 points (15 points each). Course grades will be awarded as follows.

Points Earned	Grade		Points Earned	Grade
42.5 - 45	1.0		29 - 31	3.0
40.5 - 42	1.3		27 - 28.5	3.3
38 - 40	1.7		24.5 - 26.5	3.7
36 - 37.5	2.0		22.5 - 24	4.0
33.5 - 35.5	2.3		0 - 22	5.0 (fail)
31.5 - 33	2.7			

Participation

While we cannot mandate attendance, please consider that attending the lectures and labs shows respect to your classmates and the instructors. In the first session of the labs, groups will be built for the remainder of the semester, so all students are expected to either attend or notify the instructors that they cannot attend but that they still plan to participate in the group assignment. Please take note of the registration deadlines for the course and the examination (two procedures!) and register in KLIPS 2.0 in a timely fashion.

It is the joint responsibility of instructors and students to create a respectful and inclusive atmosphere in our sessions together. Both instructors want to help you succeed in this course. If you encounter problems during the semester, either with the contents of the course or personally (e.g. illness, family, visa, etc.), and you need an extension or assistance, please contact us as soon as possible. Should you require accommodations for a disability, please also bring this to our attention.

In the spirit of respectful and mutually beneficial participation in the course, it is inappropriate to use online artificial intelligence tools like ChatGPT without citation. You are welcome to use whatever tools help you organize your ideas, find information, and improve your writing, but you should not use ChatGPT or similar tools to generate text for your assignments. This commonly results in citations to references that do not actually exist, and it can impair your learning. Please do not disrespect your classmates and instructors by trying to pass off AI-generated writing as your own work. For more information, you may consult the University of Cologne's statement on the use of AI tools: https://verwaltung.uni-koeln.de/stabsstelle02.1/content/faq/data/chatgpt/index_ger.html

The lecture and labs will be held in English. Please note that the lecturer is not fluent in German.

Course Outline

Week 1: Introduction

Lecture: 18 April	Lab A: 18 April	Lab B: 19 April

Readings:

- Gerring, John (2004): What is a case study and what is it good for? American Political Science Review 98 (2): 341-354.
- Mahoney, J., Goertz, G. (2006): A Tale of Two Cultures: Contrasting Quantitative and Qualitative Research. Political Analysis, 14(3), 227-49.
- Rohlfing, Ingo (2012): Case Studies and Causal Inference. Basingstoke: Palgrave Macmillan: chap. 1.

Lab content: Building groups and selecting a qualitative article. Attendance at this week's lab is necessary to join a group. Students will work in these groups throughout the rest of the semester.

Week 2: Research Questions, Sources, and Data in Qualitative Research

Lecture: 2 May | Lab A: 2 May | Lab B: 10 May ** Please note!

Readings:

- King, Gary, Robert O. Keohane and Sidney Verba (1994): Designing Social Inquiry: Scientific Inference in Qualitative Research. Princeton: Princeton University Press: 14-19.
- Hurst, Allison. (2023): Introduction to Qualitative Research Matters: A Helpful Guide for Undergraduates and Graduate Students in the Social Sciences. Oregon State University. https://open.oregonstate.education/qualresearchmethods/ Chapter 10: Introduction to Data Collection Techniques
- Yin, Robert K. (2013): Case Study Research: Design and Method. Thousand Oaks: Sage: ch. 4.
- Glaser, Barney, and Anselm Strauss (1967): "The Constant Comparative Method of Qualitative Analysis." In The Discovery of Grounded Theory: Strategies for Qualitative Research. New York: De Gruyter. https://groundedtheoryreview.com/2008/11/29/the-constant-comparative-method-of-qualitative-analysis-1/

Lab content: Identifying sources and getting started with MAXQDA will be the focus of the labs. For qualitative data analysis (QDA), you will work with MAXQDA. During the course, you will get from us a free MAXQDA license that is valid for 120 days. This will be enough for working on all assignments. In this lab, you will do the first steps with MAXQDA. Substantively, you will start identifying the sources used in the selected article and try to collect them for your reanalysis of the article.

Week 3: Case Selection and Comparison

Lecture: 16 May | Lab A: 16 May | Lab B: 17 May

Readings:

- Eckstein, Harry (1975): Case study and theory in political science. Greenstein, Fred I. and Nelson W. Polsby (ed.): Strategies of inquiry. Handbook of Political Science, Vol. 7. Reading, Mass.: Addison-Wesley: 79-137.
- Levy, J.S. (2008): Case Studies: Types, Designs, and Logics of Inference. Conflict Management and Peace Science, 25, 1-18.
- Lijphart, Arend (1971): Comparative Politics and the Comparative Method. American Political Science Review 65 (3): 682-693.

Lab content: This week's lab focuses on the collection of sources and discussion of qualitative coding. Groups should discuss progress on collecting sources and possible problems and strategies to address them.

Week 4: Process Tracing and Interpretation of Evidence

Lecture: 6 June | Lab A: 6 June | Lab B: 7 June

Readings:

- Bennett, Andrew and Jeffrey Checkel (2014): Process tracing: From methodological roots to best practices. Bennett, Andrew and Jeffrey Checkel (ed.): Process tracing in the social sciences: From metaphor to analytic tool. Cambridge: Cambridge University Press: 1-37.

- Trampusch, Christine, and Bruno Palier. (2016): Between X and Y: how process tracing contributes to opening the black box of causality. New Political Economy 21 (5): 437-454.
- Beach, D., Pedersen, R.B. (2013): Process-Tracing Methods. Foundations and Guidelines. Ann Arbor, MI: University of Michigan Press. 23-44 (Chapter 3).

Lab content: The lab will focus on interpreting evidence for the selected empirical article. Following the discussion in the lab, you will practice the interpretation of evidence in your selected article. Goal: reevaluate the interpretation of all evidence that you have identified

Students interested in this topic may appreciate the following *optional* texts:

- Elucidating causal mechanisms: Fairfield, Tasha and Candelaria Garay (2017): Redistribution under the right in Latin America: Electoral competition and organized actors in policymaking Comparative Political Studies 50 (4): 1871-1906 + appendix. (the appendix in particular)
- Theory testing process tracing: Löblová, Olga (2018): When epistemic communities fail: exploring the mechanism of policy influence. Policy Studies Journal 46(1): 160-189.
- Systematic process analysis: Wright, Chris F (2015): "Why do states adopt liberal immigration policies? The policymaking dynamics of skilled visa reform in Australia. Journal of Ethnic and Migration Studies 41 (2): 306-328.

Week 5: Interviews

Lecture: 13 June | Lab A: 13 June | Lab B: 14 June

Readings:

- Fontana, Andrea & Frey, James H. 2005. The interview: From Neutral Stance to Political Involvement. In N. Denzin & Y. Lincoln (Eds.), The Sage Handbook of Qualitative Research, 3rd edition (pp. 695–727). Thousand Oaks, CA: Sage.
- Bailer, Stefanie. 2014. "Interviews and surveys in legislative research." The Oxford Handbook of Legislative Studies (2014): Chapter 8, 167-193.
- Gerson, Kathleen, and Sarah Damaske. 2020. The science and art of interviewing. Oxford University Press, Chapter 4: Constructing an Interview Guide, 66-99.

Week 6: Generalization, Transparency, & Ethics in Qualitative Research

Lecture: 20 June | Lab A: 20 June | Lab B: 21 June

Readings:

- Lieberson, S. (1991): Small N's and Big Conclusions: An Examination of the Reasoning in Comparative Studies Based on a Small Number of Cases. Social Forces, 70(2), 307-20.
- Elman, Colin, Diana Kapiszewski and Arthur Lupia (2018): Transparent Social Inquiry: Implications for Political Science. Annual Review of Political Science 21 (1): 29-47.
- Hurst, Allison. (2023): Introduction to Qualitative Research Matters: A Helpful Guide for Undergraduates and Graduate Students in the Social Sciences. Oregon State University. https://open.oregonstate.education/qualresearchmethods/ Chapter 7: Ethics

Lab content: Discussion of how generalization is addressed in your selected article.+ Update of groups on coding: Groups can share the progress that they made, problems that were confronted and strategies for addressing those problems +Information on presentations next week: In the final lecture (see below), each group should present its reanalysis of the selected article on a presentation. In this lab session, guidelines for designing the presentations will be discussed.

Week 7: Presentations

Lecture: 27 June | Lab A: 27 June | Lab B: 28 June

Groups will present the combined results of their four written assignments.

Lab content: Finalize and share the coding for your article as a pdf file and upload to ILIAS under your group folder. The repository folder you create will be private and not accessible to anyone but you and the instructors.