Objective

This course will briefly review the different types of methods used in qualitative and quantitative analysis and then explain the appropriateness and applicability of these methods. We will then go on to explore the costs and benefits of mixing qualitative and quantitative methods. Our perspective is that no one method is better than another but that a diverse menu of social science methods offer different ways of understanding and interpreting the “truth.” The important thing is to begin with the research question, and choose the mix of methods best suited to providing answers to it. We will emphasize the benefits and drawbacks of each method and how a judicious combination of methods has the ability to address the disadvantages of one with the advantages of another. Emphasis will be placed on design and sampling issues, and the precautions that should be taken with regard to drawing generalizable inferences from qualitative data. The course will be based on selected examples of studies that use these mixed methods to conduct analyses that are of relevance to poverty and inequality – such as poverty assessments and impact evaluations.

Outline

Monday, February 4, 2008

Opening
8:30-9:00 OPENING REMARKS AND INTRODUCTION

Session I
9:00-9:30 INTRODUCTION TO MIXED METHODS

Presenters: Vijayendra Rao and Michael Woolcock

Themes: Engaging the Research and Evaluation Process
How do we let the question of interest drive the method that we use?
How do we distinguish data from the methods used to collect them?
How do we classify the various methods and tools available to the researcher? ‘Mixed methods’ as a strategic response to a particular set of (usually) complex, difficult questions; not an inherently better way to proceed (though many development problems do not map neatly onto a single methodological approach).
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<th>Session</th>
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| Session II | INTRODUCING QUALITATIVE AND QUANTITATIVE METHODS | 9:30-10:00 | Michael Woolcock | What Qualitative Methods Can and Cannot Do
A brief overview of qualitative methods – focus group discussions, in-depth interviews, participant observation, PRA/RRA, textual analysis, etc. – and an assessment of their respective strengths and weaknesses. |
| | A BRIEF REVIEW OF QUALITATIVE METHODS AND DATA | 10:00-10:30 | Vijayendra Rao | What Quantitative Methods Can and Cannot Do
The logic of statistics, sampling methods, the notion of a standard error, Representativeness, generalizability, causal impact, etc. Assessing the strengths and weaknesses of quantitative approaches. |
| | BREAK | 10:30-10:45 | | |
| Session III | QUALITATIVE METHODS IN MORE DETAIL | 10:45-11:30 | Vijayendra Rao | In this session we will outline some of the important types of qualitative methods, highlighting their advantages and disadvantages. |
| | PARTICIPATORY METHODS: PRA/PPA | 11:30-12:30 | Vijayendra Rao and Michael Woolcock | The origins, promises and pitfalls of ‘participatory’ methods, and their incorporation into research and poverty analysis. The crucial role of facilitator quality. Analyzing and interpreting data from such exercises. |
| | COMPARATIVE-HISTORICAL METHODS, CASE STUDIES | 11:30-12:30 | Vijayendra Rao and Michael Woolcock | What exactly is a ‘case’, and how can selected case study comparisons be used to infer broader statements about social, economic and political processes? How historians and other social scientists make |
‘causal’ statements about dynamic processes when ‘samples’ are necessarily small.

12:30-2:00 LUNCH

**Session IV** INTEGRATING METHODS AND DATA: PROS, CONS, EXEMPLARS

2:00-2:45 CLASSIFYING METHODS, THE PROS AND CONS OF INTEGRATION

Presenters: Vijayendra Rao and Michael Woolcock

**Themes:** Under what conditions does it make sense to integrate different methods and forms of data? An overview of the types of mixed methods strategies that are most commonly deployed in policy research; why the quality of such research is itself often “mixed”.

2:45-3:30 USING MIXED METHODS IN SOCIOLOGY AND POLITICAL SCIENCE

Presenter: Michael Woolcock

**Themes:** ‘Best practice’ examples of how qualitative tools have been used to complement and strengthen more orthodox quantitative approaches (e.g., “anchoring vignettes” to enhance comparability of cross-context survey responses; to “observe unobservables” when identifying comparable program and non-program communities), and vice versa (e.g., unpacking causal mechanisms by which a given variable “impacts” another).

3:30-3:45 BREAK

3:45-5:00 USING MIXED METHODS IN ECONOMICS: ‘PARTICIPATORY ECONOMETRICS’

Presenter: Vijayendra Rao

**Themes:** Using qualitative methods to inform household survey design and response items, and to interpret results according to their contextual meaning. Where time and resources allow, engaging with research communities in an ongoing/iterative role to enhance the reliability and validity of responses, analysis, and interpretation.
Tuesday, February 5, 2008

Session V  PRACTICAL APPLICATIONS OF MIXED METHODS IN POLICY RESEARCH

Themes: The use of qualitative and mixed methodologies will be demonstrated with detailed examples from a poverty assessment which emphasizes the social dimensions of poverty and inequality, mixed method analyses of relative (or subjective) poverty, and an analysis which shows how qualitative methods helped design new ways of measuring inequality. We will then look at an ongoing study examining the delivery of private health services in slum areas of Delhi. Finally we will look at the use of mixed methods in developing impact evaluations. The cases we will look at are an evaluation of the Jamaica Social Fund that focused on the impact of the CDD on participation, collective action and trust, and a recent effort to evaluate a CDD project in Indonesia.

9:15-10:00  RETHINKING INEQUALITY: AN INDIAN CASE STUDY

Presenter:  Vijayendra Rao

Themes: Qualitative insights led to the development of a methodology that revealed that poor pay higher unit prices for food than the rich which suggests that “real” inequality is higher than measured inequality.

10:00-10:30 UNDERSTANDING AND RESPONDING TO LOCAL LEVEL CONFLICT: ASSESSING THE IMPACT OF A RURAL CDD PROJECT IN INDONESIA

Presenter:  Michael Woolcock

Themes: Much is claimed about the capacity of CDD projects to enhance a community’s capacity for collective action; in the most hopeful cases, it is invoked as an instrument to promote the quality of local ‘governance’. Does this in fact happen? Under what conditions might we expect development projects generally, and CDD projects in particular, to either help or hinder the capacity of communities to address local conflicts?

10:30-10:45 BREAK

10:45-12:15 (Continuation)
UNDERSTANDING AND RESPONDING TO LOCAL LEVEL CONFLICT: ASSESSING THE IMPACT OF A RURAL CDD PROJECT IN INDONESIA
Presenter: Michael Woolcock

12:15-2:00 LUNCH

2:00-3:00 THE SOCIAL IMPACT OF SOCIAL FUNDS IN JAMAICA

Presenter: Vijayendra Rao

Themes: This paper develops an evaluation method that combines qualitative evidence with quantitative survey data analyzed with propensity score methods, on matched samples, to study the impact of a participatory community driven Social Fund on preference targeting, collective action, and community decision making.

3:00-3:10 BREAK

3:10-4:15 USING MIXED-METODS TO STUDY VILLAGE GOVERNANCE IN INDIA

Presenter: Vijayendra Rao

Themes: Complex processes such as village governance can benefit greatly by being studied with a mixed-methods approach. This project used qualitative methods with large scale random samples both for stand-alone studies, and also to generate measurable indicators. The combination of methods generated several insights into how village governments (panchayats) in India work.

4:15-4:40 Question and Answers/Discussion