Teaching Qualitative Research Methods in Political Science: Does One Size Fits All?

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POLITICAL SCIENCE INSTRUCTION

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ABSTRACT

Despite the relevance of qualitative methods in political science, the process of teaching qualitative research has received relatively little attention in the literature. What is it like to teach qualitative research in political science? This article focuses on the teaching of qualitative research by exploring examples from Brazil. The country is home to some of the largest higher-education providers of political science in Latin America; however, the teaching of appropriate research methods is still incomplete. This article identifies challenges to qualitative-methods education in the country and its evolution. It provides lessons about the teaching of qualitative methods that can be relevant to educators in less institutionalized political science departments, to non–English speaking learners, and to Global South scholars.

Introduction

Despite the importance of qualitative methods in political science (Bennett and Elman 2007), teaching methods for qualitative research have not received much attention in the literature. Qualitative methodology in political science evolved after the ground-breaking publication of King, Keohane, and Verba's (1994) *Designing Social Inquiry*, which inaugurated a broad range of procedures for using concepts and comparisons to generate valid descriptive and causal inferences. This became known as the new methodology of qualitative research (Mahoney 2010) and unveiled fresh challenges for educators. For instance, process tracing is usually mentioned in historical-institutional scholarship as a strategy for data collection and analysis, but this instrument is commonly misunderstood and lacks rigorous application (Collier 2011). In addition, because qualitative methods are usually considered easier to learn, word-based, and applied less frequently in graduate dissertations, there is a false perception that students do not require training with faculty guidance (Schwartz-Shea 2003). In addition, major discussion regarding qualitative research education occurs in the Anglo-Saxon context, ignoring that differences in the cultural and political context can influence teaching (Simon 2014).

The literature has focused on teaching methods for undergraduate students and the teaching of statistics and formal models to graduate students (Thies and Hogan 2005). However, little attention has been paid to the training of qualitative researchers

(Katz 2015). This article provides some reflections on this debate. More importantly, it adds to the underdeveloped but increasing accounts of the cultural, structural, and institutional challenges that qualitative research instructors face in a non-Anglo-Saxon context (Chen 2016; Simon 2014).

Why should we care about the pedagogy of teaching qualitative research methods? A more intriguing question is why should we care about "context" when teaching research methods at all? Reflecting on qualitative research pedagogy—that is, the exchange of ideas about teaching and learning processes, research techniques, or the practice of qualitative investigation—is crucial for the process of education itself (Katz 2015). Teaching research methods requires not just a transfer of knowledge, but also the ability to train students to develop skills and techniques that are essential to crafting effective research, whether it is academic or applied. For this reason, teaching research methods posits challenges that are different from many other courses in the curriculum (Adriaensen, Kerremans, and Slootmaeckers 2015). Needless to say, many scholars start their academic career with little pedagogical training; therefore, initiatives to share their experiences can be valuable. If higher education institutions want to strengthen their role in the education of future academic leaders or successful policymakers, it is critical to take the pedagogy of teaching methods more seriously.

Outside of Anglo-Saxon countries, the teaching of qualitative methods is even more challenging. Qualitative research requires in-depth and close relationships and is highly sensitive to cultural differences. In China, for instance, some social scientists consider qualitative research to be similar to the indigenous "investigative research," proposed by one of the leaders of the country's communist reform, despite its strong political agenda (Chen 2016). This requires tailoring educational practices to the sociopolitical context of the country. In addition, there is an increasing concern among universities, employers, and higher education regulators about building the capacity of the workforce to perform sophisticated research tasks in response to social challenges (Nind, Kilburn, and Luff 2015). This is particularly relevant for developing countries, where training in strong qualitative research methods can advance not just the political-science discipline, but also contribute to policy decisions that are closely related to the needs of the population. However, it is in this context, where qualitative research methods are needed, that schools are possibly less capable of providing adequate training and have limited resources to provide access to books or journals discussing the evolution of the discipline in a timely manner.

This article presents the case of Brazil as illustrative of such institutional and structural challenges. The country has one of the largest graduate programs and traditional schools of political sciences in Latin America (Bulcourf, Gutierrez Marquez, and Cardozo 2015); however, the teaching of both quantitative and qualitative research methods is still underprovided. About two decades ago, political scientists began to question the quality and availability of research-methods courses in the country (Soares 2005; Reis 1996). A leading scholar crafted the expression "methodological Achilles' heel of political science in Brazil" as students presented a strong hostility to statistics but were not adequately supported by rigorous qualitative methods teaching (Soares 2005). Although graduate education has evolved since then, qualitative research courses are still rare.

This article is divided into two sections. First, it explores the challenges of teaching research methods in Brazil and its evolution. In the second section, it draws upon some lessons about the teaching of qualitative methods and how to overcome the challenges of teaching research methods in less institutionalized political science departments, with non–English speaking learners, and with limited resources in education. We hope that our suggestions can serve educators who have similar challenges, in particular in countries with limited resources for higher education and where the challenges presented here are more evident.

Teaching research methods in Brazil: Challenges and promises

The political science scholarship in Brazil is relatively young compared to other countries, dating back to the 1960s (Forjaz 1997). In the late 1990s and mid-2000s, scholars assessed the content of dissertations and graduate curricula and warned the political science community in Brazil about the deficiencies of methodological training (Reis 1996; Soares 2005). Since then, publication of rigorous, empirical articles has increased (Oliveira and Nicolau 2014) and research methods courses were included in graduate programs (Barberia, Godoy, and Barboza 2014). Much of this evolution can be attributed to the increase of national coordination in this policy field that has allowed an expansion of graduate courses, the strengthening of science and technology in the country, and strict assessment by the Ministry of Education (MoE) regarding the quality of graduate courses (Amorim Neto and Santos 2015). Although political science in Brazil is not as parochial as it used to be, and despite its methodological leap in quantitative training, the teaching of qualitative research is still scarce (Barberia, Godoy, and Barboza 2014).

Language barriers could pose additional challenges for the teaching of qualitative methods. Limited or no English proficiency presents a significant challenge when teaching qualitative methodology. In 1996, an assessment of the social science graduate programs reported that schools had to lower their language requirements or there would not be a sufficient number of students qualified for graduate education (Reis 1996). It also called attention to the often-complete absence of international references in many dissertations. All political science graduate programs require proficiency in at least one language (mostly English) through exams or standardized tests, but commonly students lack a working knowledge of English.[1] Studying qualitative research requires extensive reading and adaptation of methods to the context of the research. In addition, language skills are essential when learning qualitative research because major debates and dilemmas about conducting qualitative research are published in English.

Another relevant concern is access to international literature in the country. In 2000, the MoE launched a virtual library consortium, named Portal Capes, of scientific journals that could be accessed by all public universities and some private schools (Almeida, Guimarães, and Alves 2010). Yet, many universities in Brazil do not grant remote access to this digital platform and students can only access it through their institution's internal network. With the exception of large university libraries, recently created or small campuses do not maintain a comprehensive collection of international books and documents.

In spite of the challenges and limits discussed so far, in the past 10 years graduate courses have taken steps to improve the teaching of research methods in the country. There are promising experiences under development in the country to expand the teaching of qualitative research methods. For instance, since 2010, the International Political Science Association has held annual summer courses in research methods in Brazil. Similar strategies have been adopted by other countries, such as Mexico and Russia. In addition, political scientists in Brazil have developed an interest in discussing teaching and learning of methods. Recently, the Brazilian Political Science Association organized a section within its annual meeting to discuss the teaching of political science and international relations.

Finally, in terms of inducing graduate political science programs into expanding the teaching of methods, the MoE is playing an important role. The evaluation of graduate education has influenced scholars to publish in more prestigious journals and also increased the position of political science education in international rankings (Marenco 2015). For the 2017 assessment, the MoE outlined that offering of research methods courses was considered a relevant criterion (Coordenação de Aperfeiçoamento de Pessoal de Nível Superior 2016). Therefore, this can encourage crucial changes.

Tailoring qualitative research teaching

The observations and suggestions presented in this section are grounded in past experience in teaching qualitative research methods courses in Brazil, as well as in the literature about teaching research methods. We do not intend to provide exhaustive guidelines but, hopefully, to stimulate the debate and contribute to the literature on qualitative research instructional and teaching approaches and share lessons with educators from countries that face similar challenges.

- In the context of limited research-methods teaching, when designing a syllabus, an instructor should consider providing some background in research design (that is, decisions about how research should be conducted and what procedures are needed). Without this fundamental aspect of the methodology, the course would be reduced to teaching research techniques. Ideally, research design should be a discipline in itself, so students would have adequate time to discuss the strengths and limitations of different research strategies and learn how to better integrate all stages of research from literature review to hypothesis proposals to methods, among others. Therefore, in countries with little experience in qualitative research training, it is critical to provide readings and discussions at the beginning of the course about what the new qualitative methodology is, how it was developed, and its recent debates.
- An active learning process can help engage students (Bonwell and Eison 1991) and motivate them to be aware of the relevance of scientific rigor in qualitative analysis, despite research methods being an unpopular course among students. Activities that involve active learning processes also allow the connection between concepts and practice. The application of concepts to students' local contexts and educational circumstances can stimulate them to critically reflect

and develop solutions within these contexts. Furthermore, these activities increase students' repertoire of practices, which will be useful in their professional paths.

An instructional suggestion is to present a real-life research challenge or puzzle for the students to intuitively solve during the beginning of each lecture. For example, "You were hired by the United Nations Office on Drugs and Crime to carry out research on human trafficking in Brazil. There is little data about this social problem. Which tools would you develop to assess human trafficking and smuggling in the country? Where would you start and how would you identify appropriate information to assist decision makers?" It is more engaging to combine traditional lectures with exercises. This example also highlights that different methodologies should be used to address both theoretical and practical political and policy problems as a mechanism to develop research-method skills of students interested in following an academic path or a path as a practitioner. These activities involve interactive and participative strategies but can also engage them in group work, developing their communication and collaboration skills.

- The use of teaching approaches should consider two dimensions of qualitative research: methodological choices and methods of data collection. In the first dimension, a pedagogical suggestion is related to the well-known Sherlock Holmes case, "The Adventure of Silver Blaze" by Sir Arthur Conan Doyle, suggested by Collier (2011) to describe both process tracing and tracking causal chains. In the second dimension, the use of qualitative methodologies requires training in techniques of data collection and analysis, including documents, surveys, and interviews. Examples can include the development of interview guides and documentary assessment. In a documentary research class, each student should bring one document related to a controversial political event; in the Brazilian context, it was used the case of the impeachment of the President Collor (1992). The instructor should then divide the class into two groups, and each group has to assess, according to the lecture and reading concepts, which type of document they procured (primary or secondary source), the credibility of the information, and other things. This activity is important to address the use of evidence to better understand political events and how it is used as an input to decision making. This case is also helpful to demonstrate the limitations of using one source of evidence, the importance of combining different sources of evidence, and, most important, how different sources can be used to ensure data cross-validation.

- Another relevant, and controversial, aspect is how to blend the teaching of research methods with other subjects in political science. As suggested by Adriaensen, Kerremans, and Slootmaeckers (2015), teaching of research methods revolves around the acquisition of skills rather than just knowledge common to subject courses. Therefore, the development of skills in qualitative research could be included as a learning goal in other courses. We are aware that not all authors agree with the relevance of teaching research methods within and/or across disciplines. The literature review conducted by Wagner, Garner, and Kawulich (2011) found divergent results of this practice. We understand that cross-disciplinary

methods teaching could be a solution for the limited number of faculty available to teach discipline-based methods courses. This is a pervasive problem in many departments of political science, particularly those with limited resources that lack funding to hire staff with the specific skills to teach these methods. For example, scholars responsible for public policy lectures could include sections focusing on the role of process-tracing approaches and specific methods of data collection to investigate policy change and stability when discussing policy evaluation using documents, questionnaires, interviews, and focus groups. In addition, policy analysis classes can become an important venue to discuss the role of documentary research in historical comparative analysis.

- Regarding the language barriers, the majority of articles discussing the current dilemmas and advancements in qualitative methodology are published in English. To assist students who have limited or no English proficiency, an instructor can prepare lectures about the core concepts for each class, demonstrating their relevance to the practice of conducting research. The idea is to limit the information to essential aspects that can provide a basic cognitive structure that will allow students to organize and gain further specific knowledge through their own reading and experiences (Dhaliwal 2009). Therefore, it would be crucial to practice and debate concepts learned from the reading assignments and lectures in classes that also discuss techniques of data collection and analysis.

   Also, an alternative is to recommend papers written in their native language that apply more consistent and robust qualitative methods for their studies. Papers that summarize different methodological approaches are also useful, but there is a scarcity of this type of publication in Portuguese, for instance. It is also fundamental to encourage students in reading a second language despite their initial challenges. Students should be reminded that, as in the case for learning an instrument or playing a new sport, learning a second language improves with practice.

Table 1 provides some suggestions on classes based on problem solving/puzzles, exercises, and learning outcomes for qualitative methods teaching.

The implications of recent changes in research-methods teaching on the quality of research and publications in political science and the effectiveness of these suggestions on students' performance in qualitative methods are still unknown. However, we hope that experiences and practices shared in this article will be useful for scholars from other countries who face similar challenges, in particular those qualitative practitioners in the periphery who need to adapt their teaching materials locally to become more meaningful.

There is an imperative necessity to expand the literature on teaching qualitative research methods. Although there are a number of studies about the pedagogy of research methods available to undergraduates and how to engage and teach quantitative methods in graduate programs, the literature on qualitative research education is less developed. We need to exchange information on how to best teach skills, such as triangulation, if we want to advance mixed-methods research, and determine how to link

Table 1. Suggestions on problem solving/puzzles, exercises, and learning outcomes.

Classes	Problem solving/puzzle	Exercise	Learning outcomes
Introduction and research design	"You were hired by the United Nations Office on Drugs and Crime to carry out research on human trafficking. There is little data on this social problem. Which tools would you develop to assess human trafficking and smuggling? Where would you start and how would you get information to assist decision makers?"	Discussion of students' research interests and projects	Strengthen background in research design and overcome language barriers
Transparency and replication in qualitative research	In April 2016, the governor of São Paulo declared that the São Paulo Research Foundation was wasting public resources in useless social science research instead of investing in health research institutions. What is the relevance of social science? To whom? What is its purpose?	Ask three students to volunteer to present and discuss papers on transparency in researching authoritarian regimes, in the context of violence and in process-tracing research.	Strengthen background in research design and address qualitative methods through practical political and policy problems
Documentary research	How would you research in historical archives, for documentary material that best help you test and develop your theories?	Ask the students to bring one document related to the impeachment of President Fernando Collor in Brazil. Divide the class into two groups and have each group assess, according to the lecture and reading concepts, which type of document theirs was (primary or secondary source), the credibility of the information, and other issues.	Address qualitative methods through practical political and policy problems, develop skills and knowledge in methods of data collection, and blend the teaching of research methods with other subjects in political science
Elite interview	In your opinion, what is the difference between elite/specialized interviews and other forms of interviewing?	Present several interview questions and ask students to explain what the problem with them is (e.g., bias). Ask them to formulate interview questions on some specific topics.	Develop skills and knowledge in methods of data collection
Process tracing	The instructor presents an image of dominos laid in sequence but missing the middle pieces. Ask if the first piece caused the fall of the last piece or if just the first and the last one fall.[a]	Process-tracing exercise proposed by Collier, 2011, the Silver Blaze case.	Develop skills and knowledge in methodological choices and overcome language barriers

[a]Based on the example provided by George, and Bennett (2005).

theoretical concepts to historical empirical investigation if we want to advance process-tracing analysis.

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Note

1. Portuguese is the official language of Brazil. Only 5.1% of the population over 16 years of age report some knowledge of English (British Council Brasil 2014).

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