



Outline of course on:

## “Mixed Methods and Case Study Research”

**Instructor:** Werner J. Patzelt

Case study research inevitably is mixed methods research. This becomes clear as soon as we look at “triangulation”, which is at the core of case study research. This procedure does not only mean “looking at the same data” from different perspectives, i.e. through the lenses or concepts of various research guiding theories. It also means using different data sources to find out the “how” and “why” of a phenomenon under study, and it also means the parallel or sequential use of different methods of data collection.

The course will start with an overview of the qualitative and quantitative methods used in the social sciences, and with an introduction into the basic ideas of mixed methods research. Next, some often discussed “background theories” on the nature of social reality and on fitting research approaches will be discussed.

After this basic introduction, case study research proper will be presented, integrating those research projects on which participants may be working. The following topics will be covered:

- What is case study research good for? (like finding explanations for specific cases, making inferences on causal mechanisms, improving or constructing theories, evaluating policy measures ...)
- How do we properly set up an adequate case study design?
- What is a (good) “case”, and how do we “sample” in case study research? (relationships between single case research, small-n comparative research, and large-n variance-oriented research; including an overview of the various forms of case study research)
- How is (qualitative and quantitative) data collection done adequately in case study research?
- What are effective procedures of (qualitative and quantitative) data analysis in case study research?
- How to write good research reports on mixed methods studies and / or on case studies?

After completing this course, participants should be able to develop and to work through convincing research designs of their own, either for mixed methods studies in general, or for case studies in particular.

Basic knowledge of social science methodology would be helpful for this course. Participants with an emerging, or ongoing, mixed methods project of their own, or a case study project, will enrich the class very much, since in this case course teaching and own research activities can benefit from each other, and manifold research experiences can be shared.

Morning sessions will be devoted to lectures and classroom discussions, afternoon sessions to individual exercises and to seminar presentations by participants.



### **Core readings (see daily reading lists)**

Creswell, John W. / Plano Clark, Vicki, 2011: *Designing and Conducting Mixed Methods Research*, Los Angeles et al.: Sage

Yin, Robert K., 2014: *Case Study Research. Design and Methods*, 5th ed., Los Angeles et al.: Sage

### **Additional readings**

Bennett, Andrew, 2004: *Case Study Methods. Design, Use, and Comparative Advantages*, in: Detlef F. Sprinz / Yael Wolinsky-Nahmias, eds.: *Models, Numbers & Cases. Methods for Studying International Relations*, University of Michigan Press, pp.19-52

Bergman, Manfred Max, ed., 2008: *Advances in Mixed Methods Research*, Los Angeles et al.: Sage

Gerring, John, 2004: *What is a case study and what is it good for?*, in: *American Political Science Review* 98, pp. 341-354

Gerring, John, 2008: *Case selection for case-study analysis: Qualitative and quantitative techniques*, in: *Political Methodology*, ed. by J.M. Box-Steffensmeier / H.E. Brady / D. Collier, Oxford University Press, pp. 645-684

Levy, Jack S., 2008: *Counterfactuals and case studies*, in: *Political Methodology*, ed. by J.M. Box-Steffensmeier / H.E. Brady / D. Collier, Oxford University Press, pp. 627-644

### **Additional material**

A detailed power-point slide show on mixed methods approaches and case study research by the instructor will be used throughout the course, and will be downloadable by participants two weeks before the class starts.

## **Week 1:**

**Monday:** Basic epistemology and methodology: What methods do we use in the social sciences for data collection and data analysis, and why so?

Yin, 103-118: "Collecting case study evidence"

on triangulation: Hammersley, Martyn: "Troubles with triangulation", in: Bergman, 22-36

according to already available knowledge: overviews in any textbook on data collection and data analysis

**Tuesday:** What is "mixed methods research"?

Creswell/Plano Clark, 1-38: "The nature of mixed methods research", "The foundations of mixed methods research"

Creswell et al.: "Methodological issues in conducting mixed methods research designs", in: Bergman, 66-83



**Wednesday:** What is “social reality”, and how should we study it adequately?

Bergman, Manfred Max: “The straw men of the qualitative-quantitative divide and their influence on mixed methods research”, in: Bergman, 11-21  
Creswell/Plano Clark, 38-52: “Philosophical foundations”

**Thursday:** What is “case study research”?

Yin, 2-25: “Getting started”

**Friday:** What is a “research design”? (with a special look at case study research)

Yin, 26-49: “Designing case studies”

## Week 2:

**Monday:** Sampling in case studies and in (other) mixed methods studies

Yin, 49-69: “Case study research designs”

**Tuesday:** Mixed-methods research designs in depth

Creswell/Plano Clark, 53-142: “Choosing a mixed methods design”  
Tashakkori, Abbas / Teddlie, Charles: “Quality of inferences in mixed methods research”, in: Bergman, 101-119

**Wednesday:** Data collection in (mixed methods) case studies

Yin, 71-102, 118-130: “Preparing to collect case study evidence”, “Four principles of data collection”  
Creswell/Plano Clark, 171-201: “Collecting data in mixed methods research”

**Thursday:** Data analysis in (mixed methods) case studies

Yin, 132-175: “Analyzing case study evidence”  
Creswell/Plano Clark, 203-250: “Analyzing and interpreting data in mixed methods research”

**Friday:** Writing professional research reports on (mixed methods) case studies

Yin, 176-206: “Reporting case studies”  
Creswell/Plano Clark, 251-272: “Writing and evaluating mixed methods research”