

Introductory Preface to an Open Workshop, June 15, 2010

**10 am to 4 pm, University of Manchester,
John Casken Lecture Theatre,
Martin Harriss Building,
Oxford Road, Manchester**

Systematic Mixed Methods Research: What, Why, and How?

The idea of systematising data and analysis is anathema to some qualitative researchers. Yet mixed methods research is, arguably, inherently a qualitative and not a quantitative activity. In this workshop we answer three questions about this potentially confusing situation. WHAT is it? WHY do it? HOW do you do systematic analysis using mixed (qual+quant) methods?

WHAT IS SMMR: systematising means making explicit the comparisons and contrasts across cases, whilst also recognising the aspects that are incommensurate. Systematic research also focuses on the contextual factors that affect outcomes. These context factors are to some extent historical and they require triangulated evidence – ie. historical narratives and historical time-series or the

Potentially important additional areas:

Management, organisations, nested and non-nested cases of institutions;

Anthropology, tracing ideas through multicultural society;

Resources, marketisation, globalisation, development and macro forces

Examples

1. **Qualitative comparative analysis with crisp –set causality (qual-qual)**
2. **Fuzzy set interpretive analysis (qual-quant)**
3. **Fuzzy set causal analysis using qca with calibration (quant-quant)**
4. **Weighted analysis of non-random sample data sets**
5. **latent class analysis of mixed-type data sets (qual-quant)**

interpretation of cross-sectional data from various dates. Systematic mixed-methods research is likely to cut across three important areas of social science, and may delve into three other areas if a topic requires it:

IMPORTANT SUBSTANTIVE
AREAS FOR EACH SYSTEMATIC
MIXED-METHODS RESEARCH
PROJECT

Power and politics (qualitative)

Social change, history and visions of the future as they influence agents in the present

Patterns of action, **embodied habit**, deviance, structure, institutionalisation – the usual content of quantitative sociology, economics and psychology (likely to have a quantifiable element)

In presenting an overview of areas of research suited to mixed methods we have biased the case in favour of our own view! We argue that the social science of qualitative method without any recourse to quantitative evidence, when it avoids using statistical methods or any other method of drawing out conclusions about patterns, is a weak and infertile social science. For the cutting-edge research in social science, which is generally inter-disciplinary if not even transdisciplinary, a mono-method science or the use of a single data type, over and over, is not going to be adequate.

Topics like sustainable development, green consumerism, globalised competition with 'Other' countries, and

the psychology/economics of tourism all illustrate the importance of having systematic study methods for inter- and transdisciplinary research.

What is really special about SMMR is the recognition that the social world is patterned, but is changing; it is an open system. Its systemic features include patterns that are discernable using statistics, but important additional properties of the social world require qualitative and exploratory research to discover.

WHY DO SMMR: The need for systematic research arises in part from some concerns we have about non-systematic research. Specifically, if an author knows only how to use qualitative methods, and has only got qualitative data, they are disabled as researchers. The best historians, the best anthropologists, the best sociologists, etc. all use mixed methods in their careers.

On the other hand, however, mixing methods is complex, challenging, and time-consuming. You may not want to mix them in a specific small project. But the career matters; large grant-funded projects matter; these should be mixed-method and systematic. As the mixed-methods literature gathers speed and grows world-wide, we wish to argue that sometimes qual-qual mixing is not sufficiently well grounded in the facts about reality. We also argue that the prospects for purely quantitative social science are restricted.

Fundamental social change makes panel studies continually out of date. No matter how well-piloted, the survey method's categorisation of respondents' answers and its focus on 'accurate' measurement get waylaid by real changes overtaking the research tools. The qualitative researchers are right in their critique of pigeonholing and in their claim that research is powerful in both extending and modifying dominant discourses.

This is especially true for government-funded research. We wish to focus in part on WHY government-funded research in particular needs to have systematic mixed-methods components. Best of all we can offer new ways to do it.

HOW TO DO SMMR (SEE BOXES): Several new techniques exist which offer the triangulated analysis of mixed data types. These rather obviously would include discourse analysis, narrative analysis, and the anthropology of budgeting or of economic categories generally. In other words if you are studying numbers, and you use a qualitative method, then you have a kind of mixed-type data set and you use a mainly qualitative method to survey it and draw out patterns. The analysis of the quantitative data for what it 'tells' you can be augmented by telling readers what the creators of the quantitative data wanted their readers or users to think. These are rather hermeneutic interpretations. Interesting sequenced mixed-methods research projects like this are becoming ever more popular.

However more systematic analysis, and research methods that go far beyond discourse analysis, are now available. We provide both expert demonstrations and empirical examples of the following four systematic mixed-methods research strategies:

1. qualitative comparative analysis with crisp –set causality
2. fuzzy set interpretive analysis
3. fuzzy set causal analysis using QCA with calibration blended in
4. weighted analysis of non-random sample data sets
5. [there are many other methods such as systematic case study comparisons, social network analysis, pluralist theory falsification and exploration, and multiple correspondence analysis, but we are not covering them in the workshop.]