

# Qualitative Methods

Newsletter of the  
American Political Science Association  
Organized Section on Qualitative Methods

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## Letter from the Editor

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With this issue, the editorship of this newsletter passes from John Gerring to myself. On behalf of the members of the section, I would like to thank John for his excellent work in establishing and editing this newsletter for the first three years of its existence. He has made it one of the best newsletters of any of the APSA sections.

Because of John's excellent work, there is little that I want or need to change in the format or content of the newsletter. I will continue to solicit pieces and symposia that reflect the interests and diversity of the membership of the section. I also see the newsletter as an outlet for work that does not fit the research article genre. This is clearly part of the mission of *Perspectives on Politics* for the association as a whole, and I see it as part of the mission of the newsletter for the qualitative methods section. I encourage you, the readership, to submit articles (not too long), symposia, op-ed pieces, and other such items to me.

Qualitative methods have been changing rapidly over the last few years. One aspect of that change has been an increase in the number of qualitative methods courses and changes in their content. Next year I would like to publish a review of qualitative methods courses. Please email me descriptions of courses that you teach (or will teach), or courses taught in your department. Please also indicate if you would like the syllabi you send to be included on CQRM's syllabus webpage at <http://www.asu.edu/clas/polisci/cqrm/syllabi.html> and we will forward them for posting.

The section sponsored or cosponsored 26 panels at the annual meetings in Philadelphia. Feedback from section officers and program chairs indicates that they were well attended, and the official statistics from APSA put the section in a three-way tie for third in mean attendance. As a result of this strong showing, for the fourth year running our panel allocation for 2007 has increased by the maximum of five. Overall, the section has had very good attendance at panels over the past few years, attesting to the interest qualitative methods has generated. Thanks go to Melani Cammett and Julia Lynch for organizing the panels this year.

Finally, I am sad to report the death of Alexander George. He was an incredible scholar, mentor, friend, and teacher to

many of us. I need say no more since Jack Levy and Debbie Larson have written an obituary for him in this issue.

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## Why Quantitative Social Science Needs Interpretive Methods

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In this article I will argue for the claim that a current leading approach to quantitative social science—and economics in particular—cannot legitimately stand on its own, but, rather, must always be supplemented by strategic use of interpretive investigative methods.

The “leading approach” I have in mind is what I will call the “Mathematical-Metaphorical” (or “M-M”) approach, which entails the use of mathematical models as metaphors for social phenomena to illuminate puzzling or obscure aspects of those phenomena and their dynamics. This approach is virtually universal in economics and rational choice political science, and has expanded (and continues to expand) into other fields of social inquiry.

As I will argue below, M-M methodology can be deployed coherently only under certain conditions, and establishing that these conditions are met is not currently a necessary part of the normal business of quantitative social science. As such, analyses utilizing the M-M method in the social sciences operate under a cloud of possible incoherence. Dispelling this cloud requires establishing that the proper conditions are met for application of the M-M method, and this will necessarily involve interpretive investigative methods.

My argument will proceed in three stages. First, I will explain in more detail what the M-M method is and how it works. Second, I will establish two necessary conditions for the coherent use of M-M methodology in the social sciences. Third, I will explain why interpretive methods must be used to establish these necessary conditions.

### The Nature and Functioning of the M-M Method

The M-M Method is a tool for explaining social phenomena by constructing a mathematical metaphor for these phenomena. It involves utilizing mathematics not merely as an accounting tool, but as a framework within which to interpret social phenomena. In the next section I will explain more precisely in what sense the M-M method is necessarily metaphorical. But first, in this section, I would like to elaborate on what the M-M method consists in.

Procedurally, the M-M method involves identifying a set of social phenomena to be explained/understood, constructing a mathematical model to metaphorically represent the phenomena, and then interpreting the solution dynamics of the mathematical model as possible solution dynamics of the social phenomena.

The framework I will introduce in this section—which I

will call the “Four-Part Framework” or “FPF”—is meant to capture precisely these elements. It describes four phases through which every M-M analysis must pass, namely:

1. *Delimiting*, in which the set of social phenomena under study is delimited and a research question is formed;
2. *Naming*, in which a mathematical construct meant to be analogous to the social phenomena is introduced. Significantly, the *Naming* phase produces a *catalog of correspondences* linking the elements of the set of social phenomena with their mathematical representatives;
3. *Solution*, in which the mathematical construct is brought to a solution; and
4. *Interpretation*, in which the mathematical solution and its implications are interpreted with respect to the research question.<sup>1</sup>

In addition to delineating the four phases of economic analysis, the FPF also highlights an important divide in M-M analysis—i.e., the divide between the realm of ordinary language descriptions (the language of ordinary usage and linguistic convention) and mathematical language descriptions. M-M analyses must twice cross this divide. The research question will be phrased in ordinary language, and this is not arbitrary or incidental: M-M analyses are meant to unravel complexities of the world as we encounter it, and description of that world must, in the first instance, be done on its own terms. The mathematical construct, on the other hand, will be articulated and manipulated using mathematical language. And in the final stage of the analysis, when the initial research question is answered, ordinary language will again be used. Figure 1 summarizes the FPF in graphical form.<sup>2</sup>

Examples of the use of M-M in social science are not hard to find, and in economics and rational choice political science it would be more difficult to find an analysis that does not utilize M-M than to find one that does. To offer just one example, from the field of labor economics, consider Carl Shapiro and Joseph E. Stiglitz’s seminal paper on efficiency wage theory, “Equilibrium Unemployment as a Worker Discipline Device” (1984).

In the *Delimiting* phase of their analysis, Shapiro and Stiglitz identify as a puzzle the persistence of unemployment. They delimit unemployment and related social phenomena as the set of social phenomena with which their analysis will be concerned:

Involuntary unemployment appears to be a persistent feature of many modern labor markets. The presence of such unemployment raises the question of why wages do not fall to clear labor markets. In this paper we show how the information structure of employer-employee relationships, in particular the inability of employers to costlessly observe workers’ on-the-job effort, can explain involuntary unemployment<sup>[3]</sup> as an equilibrium phenomenon. Indeed, we show that imperfect monitoring neces-