FURTHER EDUCATION AND TRAINING

ANNOUNCEMENT

JOINT WORKSHOP
OF BAGSS AND LIfBi

WORKSHOP

Case selection and generalization – variance- and case-based strategies

Instructor	Derek Beach, Professor, University of Aarhus, Denmark (derek@ps.au.dk)
Time	Monday, **17.06.2019**; 09:00-16:00 (c.t.) Tuesday, **18.06.2019**; 09:00-16:00 (c.t.) Wednesday, **19.06.2019**; 09:00-16:00 (c.t.)
Place	BAGSS, Feldkirchenstraße 21, FG1/00.06
Registration	To register, please send a mail to courses.bagss@uni-bamberg.de. Registration is mandatory: the number of participants is limited to 20! **Deadline for registration: 13.05.2019**

Course goals

The aim of this course is to introduce participants to the core principles of case selection and generalization strategies within both variance-based and case-based approaches. The course starts with the presentation of the core similarities and differences between the two approaches at the ontological level, focusing on the types of causal claims being made and the implications they have for case selection and generalization. The variance-based approach builds on counterfactual causal claims that are best assessed using experimental designs. In contrast, the case-based approach focuses on mechanistic causal claims that are best assessed by tracing their operation within individual cases. Therefore, variance-based approaches can be thought of as a form of 'top-down' approach because they provide evidence of mean causal effects of variables across many cases (i.e. within a population or sample thereof), whereas case-based approaches are 'bottom-up', taking individual cases as the analytical point of departure.

After exploring the ontological foundations of the two approaches, the course then introduces the state-of-the-art as regards case selection and generalization within the two approaches. For case-based approaches, we discuss the combination of rigorous comparisons that bound populations into relatively homogeneous sets using Qualitative Comparative Analysis (QCA) and the strategic selection of positive typical and deviant cases within these sets for in-depth Process-tracing analysis. For variance-based approaches, we discuss different techniques relating to the selection of representative cases, extreme, influential and outliers, along with matching techniques.

Course description

Day 1 – The foundations and differences in case-based and variance-based approaches
- Beach, Derek, and Rasmus Brun Pedersen (2016). *Causal Case Studies*. Ann Arbor: University of Michigan Press. Chapters 1 - 2.

- Khosrowi, Donal (2019). Extrapolation of causal effects – hopes, assumptions, and the extrapolator's circle. *Journal of Economic Methodology* 26(1): 45-58, DOI: 10.1080/1350178X.2018.1561078

- Geddes, Barbara (1990). How the cases you choose affect the answers you get: selection bias in comparative politics. *Political Analysis*, vol. 2, no. 1, pp. 131-150.

- Collier and Mahoney (1996). Insights and Pitfalls: Selection Bias in Qualitative Research. *World Politics*, Vol. 49, pp. 56-91.

Day 2 – The logics of case-based and variance-based strategies for case selection and generalization
- Clarke, B., D. Gillies, Phyllis Illari, Federica Russo, and Jon Williamson (2014). Mechanisms and the Evidence Hierarchy. *Topoi* 33 (2): 339–60.

- Beach, Derek, and Rasmus Brun Pedersen (2019). *Process-tracing methods*. 2nd edition. Ann Arbor: University of Michigan Press. Chapter 4.

- Kuehn, David and Harold Trinkunas (2017). Conditions of Military Contestation in Populist Latin America. *Democratization* 24(5):859–880.

- Gerring, John, and Jason Seawright (2007). Techniques for Choosing Cases. In *Case Study Research*. Cambridge: Cambridge University Press, pp. 86–150.

Day 3 – Combining standards across approaches in multi/mixed-methods designs?
- Humphreys, Macartan, and Alan Jacobs (2015). Mixing methods: A Bayesian approach. *American Political Science Review* 109(04):653–673.

- Seawright, Jason (2016). *Multi-Method Social Science*. Cambridge: Cambridge University Press.

- Beach, Derek (2019). Multi-Method Research in the Social Sciences: A Review of Recent Frameworks and a Way Forward. *Government and Opposition*, 1-20. doi:10.1017/gov.2018.53

About the instructor:

Derek Beach is a professor of Political Science at the University of Aarhus, Denmark, where he teaches case study methodology, international relations, and European integration. He has authored articles, chapters, and books on research methodology, international negotiations, referendums, and European integration, and co-authored the books *Process-tracing Methods: Foundations and Guidelines* and *Causal Case Studies* (both with University of Michigan Press). He has taught qualitative case study methods at ECPR and IPSA summer and winter schools, held short courses at the APSA annual meeting on Process-tracing and case-based research, and numerous workshops and seminars on qualitative methods throughout the world. He is also an academic co-convenor of the ECPR Methods Schools.