

Analyzing, writing, and retooling in the field

This chapter marks a transition point in the book.¹ Chapters 3 and 4 laid out key aspects of preparing for and organizing field research. Chapters 5 through 9 examined particular data-collection techniques, highlighting some of the challenges researchers face when deploying them in the field, and offering sets of strategies for addressing those challenges. Here, we return to thinking about the research endeavor as a whole.

Gathering information, day-by-day and hour-by-hour, is a critical facet of field research. Yet whether researching in an archive, conducting interviews, or carrying out field experiments, the most effective fieldworkers find a balance between collecting data and handling the related logistical minutiae that all field research involves (which we might characterize as focusing on the “trees”) and continually trying to envision the big picture, develop their arguments, and hone their theoretical contributions (that is, keep the “forest” in view). Put differently, throughout their time in the field, good field researchers simultaneously play the role of project manager, deftly devising and executing research routines that lead to the systematic collection of a range of rich data, *and* of principal investigator – head theorist. One way for a scholar to bring the forest into focus, and to bridge the project manager and principal investigator roles, is to begin to analyze the information she is gathering while she is still in the field.

We offer a brief example from one of our interviews to illustrate the intellectual dividends that analyzing information as it is collected can pay. Our respondent initiated fieldwork in Africa with a “beautiful” typology reflecting a “spectrum of violence” on which she hoped to place actors using information conveyed in interviews. Yet, as she began to interview and to analyze what she was being told, she discovered that respondents were not “self-advertising” the characteristics she hoped to use to categorize them. She quickly realized, she recounted, that “nobody is going to hold out a sign

¹ Some of the ideas developed in this chapter originated with Julia Lynch (2004).

and say ‘I’m a pillager.’” Moreover, through analyzing the data she was gathering, she saw that her pre-determined categories were too static: many respondents fit in more than one category (jumping among them over time), or sat in border areas. While she retained the spectrum as a key piece of her analytic framework, how she thought about it “changed entirely” due to on-the-ground analysis of the data she was bringing together. That modification, she believes, became a strength of the book she ultimately wrote.²

To be clear, and as we noted in Chapter 1, we understand “analysis” to comprise a diverse set of tasks and strategies that scholars employ to understand the pieces of the research puzzle individually and in the aggregate, and to fit them into the project as a whole. These tasks vary from less formal “back of the brain” percolating (e.g., reconsidering the interactions observed during a focus group in light of information subsequently gathered from a series of newspaper articles); to organizing, digesting, and processing information; to more formally employing qualitative analytic methods or tests of statistical significance – and everything in between. We think it can be helpful for scholars to engage actively, consciously, and explicitly in all of these forms of analysis while in the field – and to detail how they did so in their written products. As we have sought to demonstrate, the informed iteration between data generation and data analysis that fieldwork entails is what makes it such a powerful mode of inquiry. Correspondingly, the more consciously and systematically scholars engage in these tasks, and the more transparent they are about how they did so, the better their work and the more persuasive its presentation will be.

The central point we wish to underscore in this chapter, then, is that data analysis should not be thought of as a discrete research phase that starts after data gathering has ended: scholars should engage in analysis (in the multiple forms it can take) *throughout their time in the field*.³ Timely analysis of the information they are collecting allows scholars to move the intellectual ball forward, and to integrate what they are learning and finding back into their projects. That is, analyzing in the field helps them to make sense of what they are absorbing, generate new hypotheses, and identify causal mechanisms. It also allows them to identify problems with their research design or data-collection techniques, and adjust accordingly. The earlier such problems are

² Interview, LM-20, September 20, 2012.

³ We understand that our placement of this chapter after the chapters addressing data collection might implicitly suggest that data analysis occurs after data gathering; readers should not interpret the necessarily linear progression of our book as a reflection of how we think – or believe *they* should think – about conducting field research!

diagnosed, the more easily they can be fixed. Likewise, analyzing in the field helps scholars to assess their overall progress, figure out how much work remains, and determine how to use the time they have left in the field most effectively.

This chapter also highlights how helpful it can be to begin to write, and to identify venues in which to present the fruits of one's analytic labors, while in the field. As with analysis, writing in the field can take a range of forms. No matter what format scholars adopt, however, beginning to write in the field pushes them to formulate their ideas clearly and concretely, facilitating analytic progress. If they can create opportunities to present to others (for instance, scholars in their field site) what they are writing, they may be able to get feedback that can inform the data-collection process and the overall research endeavor as well.

We also offer a diagnostic tool to help scholars identify problems with their project, and suggest strategies they can employ to trouble-shoot those problems in the field. Given the iterative nature of field research – and the flexible discipline that underlies it – scholars often make considerable adjustments to their projects while in the field. Nonetheless, we suggest that a researcher's first inclination upon encountering a data-collection or interpretive hurdle should not be to tear their project apart or change their research topic. The chapter closes with some concrete strategies scholars can employ to transition smoothly and efficiently from the field back to their home institution. Doing so, we suggest, entails gently rebalancing the intellectual scales toward a fuller focus on analyzing data and writing – a rebalancing that occurs more naturally, easily, and quickly when scholars have gotten a significant head-start on these tasks in the field. Of course, no field researcher will do *all* of what we are suggesting. Rather, we hope they pick and choose among our ideas and adopt (and adapt) those that seem most useful to them.

Analyzing in the field

Just as with our suggestion that scholars “stay organized” in the field, our recommendation that they “start analyzing” while conducting field research may seem so obvious as to not require articulation. Alternatively, scholars in a frenzy to amass more and more data may think it makes no sense to spend any time on tasks that can be carried out later. What benefits, precisely, does gathering and analyzing data simultaneously yield? And what, specifically,

do we mean when we suggest that scholars “analyze?” This section addresses those questions. We begin by offering a series of justifications for analyzing in the field. We then describe, in broad brushstrokes, several of the varied set of activities that “analysis” entails that can be carried out in the field. The final sub-section offers a more detailed discussion of coding qualitative data sources.

Most researchers are excited about their question, and thus are automatically evaluating what they can learn from their data as they gather them – that is, analyzing them. Thus much of what we advocate – critically reflecting on the data being collected, making them more intellectually accessible, and writing out initial reactions to and interpretations of them – is likely a natural extension of what many researchers are already doing routinely. That is, for many scholars, our suggestions may amount simply to being more purposive and explicit about (and, as we will suggest, documenting better) what they are already doing. Moreover, our discussion of analytic tasks is merely suggestive and far from exhaustive. Nonetheless, we hope our recommendations offer some inspiration, helping scholars to think more specifically and creatively about the kinds of analytic tasks that they can tackle concurrently with data collection.

Why analyze in the field?

It might seem logical to dedicate one’s time in the field to gathering more and more information, postponing the task of analyzing it until returning home. Such thinking has several appeals. It seems to circumscribe the complex set of tasks that need to be carried out in the field and thus to allow the researcher to focus all of her energies on the assignment that can *only* be completed in the field: data collection. Further, it feels efficient: time in the field is often scarce, so best to use it to obtain as much data as possible, leaving most analytical tasks for the post-field stage when (it seems) time will be more abundant. A more bifurcated approach might seem to make particularly good sense for scholars for whom constraints of various types dictate relatively compressed field stays and make return trips unlikely.

We believe that, for most researchers, a better approach is to consider collecting data and analyzing data as processes that move forward simultaneously and in parallel. We offer a series of inter-related reasons. First, collecting and analyzing data in tandem allows researchers to develop a better mental picture of the research context and of their project, and to

successively integrate what they are learning about the former into the design of the latter.⁴ Fieldwork, as we have insisted, is an iterative process; what the researcher discovers in the field context shapes the way he thinks about the project as a whole, and can help him to refine and strengthen each facet of research design, maximizing the likelihood of effectively answering his question. Indeed, scholars often cycle through the design – data collection – analysis stages several times before they hit on a design that is practically possible and analytically productive. Researchers are advised to take extensive notes as they alter their project architecture, documenting the basis and evidence on which they modified their research design and their field research design. Doing so will help them to avoid practices that can create inferential problems,⁵ and to make the research process as transparent as possible.

Second and relatedly, analyzing in the field allows scholars to be more reflective and thus more selective with regard to data collection. That is, carefully considering the information they are collecting allows scholars to assess their data-collection strategy, and to determine whether the information supports their initial hypotheses, refutes pertinent rival explanations, or points to alternative arguments or interpretation. In addition, considering information as it is gathered helps researchers ensure that they are collecting data in ways and forms that make them amenable to analysis using the tools they anticipate using. Doing so also aids in identifying inconsistencies in findings in time to address them, for instance, by conducting follow-up interviews with respondents to ask questions or to discuss preliminary results. Further, taking inventory of, processing, and thinking about the information they are collecting in the field allows scholars to evaluate their progress more effectively – to assess whether they have collected *enough* data and what information they still need to gather.

Third, analyzing and collecting data concurrently can help scholars to hone their data-collection skills. For instance, one scholar we interviewed explained how reviewing her interview transcripts helped her see mistakes

⁴ Many scholars whom we interviewed emphasized the importance of iteration – for example, interviews LM-6, August 30, 2012; LM-10, September 18, 2012; LM-15, September 10, 2012; LM-17, September 11, 2012; LM-20, September 20, 2012. Of course, how much flexibility one has to make research design choices along the way depends on one's data-collection techniques; scholars doing surveys or experiments, for instance, may need to decide upon and solidify more parameters of the research earlier than scholars engaging in ethnography, for instance.

⁵ For instance, it is often suggested that scholars should avoid testing new hypotheses on the same data used to generate them.

she was making while interviewing, and how the way in which she asked questions shaped the answers she received; these self-evaluations helped her to improve her interview guide and become a better interviewer.⁶ And finally, even the busiest of field researchers have periods of down time during fieldwork – because interviewees are off on a national holiday or otherwise unavailable, archives are closed, etc. These moments – whether an afternoon or an evening, a weekend or an entire week – can be golden opportunities to chip away at other facets of the research endeavor, such as processing, summarizing – *analyzing* data.

Of course, during a trip of just a few days' or a few weeks' duration throughout which one's schedule stays fully booked, it may seem wholly impractical to analyze the data one is collecting. Particularly if one is working in an archive, it may seem flatly irrational to take the time to read through stacks and stacks of documents rather than simply grabbing everything that seems even tangentially relevant and postponing perusal until later – given that one *can* collect archival documents without reading while one cannot, for instance, conduct interviews without listening. Yet we would posit that, given the heightened importance of spending the available time efficiently on shorter trips, it is even *more* important to assess the value and completeness of the information one is collecting in real time. These assessments can inform decisions about which opportunities (potential interviews, documents) to seize and which to let go – decisions that are even more critical in a short research timeframe.

Rather than cramming their schedules to the extent that they have no breathing room, we suggest scholars on short trips give themselves some time to type up notes, to summarize, even if just briefly – to *think*. One researcher's tale of woe highlights the importance of doing so: with just three weeks to spend in Uganda, she felt she could not take the time to type up most of her interview notes. She regretted that decision when the bag in which she was carrying her handwritten notes – and thus all of her hard-won data – was stolen.⁷ Of course, if we think of "data duties" in the field as a continuum with data collection at one end and data analysis at the other, scholars who have very little time to spend in the field will quite reasonably place themselves further toward the data-collection end. We simply suggest that very few scholars will benefit from thinking of their time in the field purely in terms of gathering information.

⁶ Interview, DK-11, August 7, 2012.

⁷ Personal communication, June 3, 2013.

Analysis in the field: forms and functions

As we have noted, analysis comprises a diverse set of activities. In this subsection we consider various general analytic strategies field researchers can adopt based on reading through, thinking through, and taking notes on their sources (for example, field notes, interview notes or transcripts, videos, archival documents, or newspaper articles). For instance, they might create analytic tools; evaluate the reliability of their measures, the validity of their indicators, and the evidentiary value of their data; and trace key parts of their project's analytic architecture. The next subsection addresses more systematic forms of coding.

To begin, scholars can move out from their data sources in many directions to create framework documents and analytic tools (or enhance documents and tools they began to create before leaving for the field as discussed in Chapter 3). For instance, they can draw on their sources to develop lists and tables organizing useful background information. They might construct a glossary of important terms and concepts – particularly if they are not operating in their native language. Kapiszewski (2012) developed elaborate constitutional law lexicons in both Spanish and Portuguese to which she repeatedly turned during (and after) fieldwork for her project on the Argentine and Brazilian high courts. Also, scholars could create lists of important actors or agencies or organizations, annotating them with data about how the individuals and groups relate to the dynamics under study and/or drawing out the social and professional networks within which they operate.⁸ Alternatively or in addition, scholars could establish timelines or chronologies of events relevant to their topic, e.g., covering the passage of laws or the evolution of policy in a particular area; tracking chains of events leading to a war or the collapse of a governing coalition; or logging meetings and protests in the course of a social movement or rebellion.⁹

⁸ Scholars interested in understanding the connections among some set of actors (large or small) might begin to lay the groundwork for quantitative or qualitative network analysis (see, e.g., Diani 2002). Many programs exist to execute the former (see www.gmw.rug.nl/~huisman/sna/software.html). The latter uses data garnered through interviews, archival research, and other forms of close, in-depth data collection on a small number of individual actors/nodes in a network to explore how those actors understand the genesis and nature of the ties that bind them to other actors, and thus resembles a close intellectual or cognitive ethnography. EgoNet.QF is a software tool that helps implement this approach. We thank Matthew C. Ingram for this explanation.

⁹ Various kinds of software, much of it web-based, exist for creating timelines, for instance, Timeglider (<http://timeglider.com>), TimelineMaker (www.timelinemaker.com), the SIMILE project's Timeline web widget (www.simile-widgets.org/timeline/), and Google Charts (<https://developers.google.com/chart/interactive/docs/gallery/timeline>). See Hill (1993, 64–69) on the methodological challenges involved in making timelines.

From the moment they arrive in the field, scholars should also be carefully considering their concepts, and evaluating the reliability of their measures and the validity of their indicators. The validity of their interpretations and inferences will rely on how appropriate and effective these building blocks are. They might ask local experts' help in evaluating the relevance of their concepts and face validity of their measures, or in carefully mapping their measures back to their concepts to see how well the former capture the latter (content validation). Engaging in convergent/discriminant validation of alternative measures (i.e., evaluating the association between the scores produced by alternative indicators) can also help scholars to determine whether they have effectively operationalized their key concepts (see Blalock 1979; Carmines and Zeller 1979; King *et al.* 1994; Adcock and Collier 2001; Goertz 2006). Scholars who engage in triangulation (gathering evidence in different forms from different sources) – a principle of good field research – will need to consider what procedures to use in order to aggregate those different forms of evidence to arrive at measures of key concepts. For instance, given their particular research question, should data garnered via in-depth interviews weigh more than, or less than, or simply differently from data amassed in an archive?

Further, scholars should carefully evaluate the evidentiary value of their data as they are collecting them.¹⁰ By systematically assessing their data's strengths, weaknesses, and biases (and those of the sources from which they were drawn), scholars can generate some estimate of their certainty that the data are valid, thus informing how they use them in their analysis. These assessments – and any change in them over time – should likewise be systematically documented. Engaging in these evaluation and documentation processes helps scholars to convey clear assessment of their data in their written products, thereby increasing transparency and helping them to counter a central critique of scholarship based on fieldwork – that it rests on data that are of questionable utility due to their questionable validity.

Field research plays a critical role in drawing valid descriptive inferences, especially when the empirical terrain is uncharted (i.e., few have studied the phenomenon of interest) or contested. Thus, as scholars collect data, they can also use them to map out key parts of their analytic architecture, again

¹⁰ Of course, precisely *how* a scholar evaluates the evidentiary value of her data – what “questions” she asks of them – differs from data type to data type, project to project, and scholar to scholar (depending on their epistemological commitments). We offered some strategies for evaluating data in Chapters 5 through 9.

ideally engaging in triangulation to do so. For instance, they might summarize where a set of interview respondents stands on an essential question. Alternatively, they might compare and combine data gathered from multiple sources (through several interviews, focus groups, or trips to the archive, for instance) to develop a descriptive account of a certain episode or interaction – one element of the broader phenomenon under study. Doing so can lead a scholar to discover that she has obtained very different answers to similar and seemingly objective questions across a few interviews, or that some sources systematically left certain facts or factors out of their accounts; either might signal that the topic at hand is more controversial, more sensitive, or less well understood than she originally believed. This, in turn, might lead to an update of the research design (a change in how the outcome or dependent variable will be evaluated or scored, for instance, or which cases will be compared). Alternatively, a scholar may begin to create a typology of the forms the phenomena under study can take.

Another important analytic strategy is to begin to assess what the data suggest about how different cases – individuals, local units (cities, villages, firms), episodes (strikes or public health crises), and so on – vary in particular aspects. Systematically laying out such information in one or more matrices of cases and variables can reveal gaps and omissions while it is still convenient to make a follow-up inquiry.¹¹ Presenting the data in such matrices can also facilitate comparison, and help scholars to identify relevant variation. This, again, may potentially lead to adjustments in their research design, perhaps even shifting the unit of analysis.

Consider a project concerning political participation, and in particular urban residents' contact with members of the city council. At the outset, a scholar envisions the unit of analysis to be the individual citizen, and the dependent variable to be the number of contacts a citizen had in the past year with any city council member. In order to identify variation on her dependent variable and a few potential independent variables, the researcher builds a micro-level matrix with a row for each individual in her study, and columns for some of the categories on which information was gathered through interviews: age, sex, partisan affiliation, household income, children's school, civic memberships, and contacting (see Table 10.1). The first four columns show no obvious relationship with the outcome of interest. But sorting the

¹¹ These data matrices can also be quite usefully employed *prior* to embarking on field research to envision key types of variation and develop one's research design. We are indebted to Naomi Levy for the original version of this example.

Table 10.1 Sample micro-level matrix

	Age	Sex	Party ID	Annual household income	Children's school	Civic memberships	Number of contacts with city council members / year
Interviewee 3	42	M	Dem	\$37k	Lincoln High School	International Order of Odd Fellows	22
Interviewee 6	32	F	Rep	\$76k	N/A (child in day care)	Realtors Council	14
Interviewee 2	41	F	Rep	\$69k	St. Mary's Junior High	Downtown Chamber of Commerce	10
Interviewee 5	52	M	None	\$33k	Lincoln High School	Church choir	7
Interviewee 4	29	F	Dem	Refused	N/A (no kids)	None	2
Interviewee 7	47	M	None	\$101k	East Lake Elementary School	None	1
Interviewee 1	56	F	None	\$84k	La Follette Elementary School	Symphony Board of Directors, Book Club	0

table by the dependent variable brings to light possible relationships at levels of analysis higher than the individual. Two of the citizens have children attending the same public high school, and two others are both members of city business associations. This raises the possibility that organizational affiliations, rather than individual-level demographic characteristics, may account for contacting. This discovery suggests a possible shift in the unit of analysis from “individual” to “organization,” the construction of meso-level matrices organized around school and associational type, and the gathering of further organization-level information (perhaps examining issues on which the schools or business groups have actively called for city council help, for instance).

Of course, similar types of adjustments might be made in a quantitative analysis. A scholar studying presidential politics in Central and Eastern Europe since the transition to democracy, for instance, might begin her inquiry expecting the unit of analysis to be a president (or presidential administration). Discovering significant heterogeneity with respect to dynamics during a single presidential administration, however, would recommend a shift in the unit of analysis from “president” to “president-year.” Drawing on all of the strategies suggested in this sub-section, we hope our main point is clear: there are many ways in which scholars can get in dialogue with their data, and begin to learn from them, while they are in the field collecting them.

Coding qualitative data sources

Coding qualitative sources essentially entails reducing many words to fewer words, or converting words to numbers, with the goal of identifying patterns and trends. The more informal types of coding mentioned in the previous subsection – digesting, processing, and making qualitative data more accessible – might be most useful earlier in a scholar’s time in the field while she is still nailing down the contours of the project, confirming she is on track, and beginning to identify trends. The more formal or systematic coding that we discuss here, and computer-assisted coding in particular, is more profitably carried out once scholars have their analytic framework relatively well developed, since a great deal of thinking and analyzing must happen *before* such programs can be effectively employed. As such, using such programs maximally – to help with coding – while in the field may be inadvisable for scholars doing just a few weeks or a month of fieldwork. Nonetheless, even for those scholars, such programs can be useful more minimally for data management purposes. While we also briefly touch on

techniques for processing quantitative data, given the wealth of literature in political science that examines coding, assembling, and cleaning quantitative datasets, we focus on how scholars can process their qualitative data sources while in the field.

Scholars hailing from different epistemological traditions may think differently about coding qualitative data sources, and follow different procedures. Scholars in the interpretive tradition, for instance, may question whether evidence is embedded in text in an objectively identifiable way, and may believe that any interpretation of a text is just one of many possible interpretations (Wesley 2014, 3–4). Likewise, they may prefer a more holistic approach to processing qualitative data. Rather than simply parsing, categorizing, or sorting, they may focus on *how* categories are constructed, excavating divergences in meanings and considering how concepts are constituted differently by different people at different times, thereby complicating the notions of categorization and calling into question the possibility of neat counting. More positivist scholars may hold that words and concepts can be identified and counted, and that such quantification is a meaningful representation of the (relatively straightforward and comprehensible) content of the qualitative data source at hand. We hope all kinds of scholars will find the suggestions we offer here directly applicable to their research, or will be able to think of possible analogues in their own work.

As noted previously, scholars from any epistemological tradition can begin to analyze their qualitative sources from the day they begin to collect them – by reading through them (or listening to them, or viewing them), and taking notes. They may make note of the new information, important ideas, useful examples, or revealing quotations the sources contain; code for key words and concepts, noting how words are being used and what ideas or dynamics are repeated or, conversely, missing altogether; quantify qualitative information; or register their reactions to particular pieces of data (why is it relevant? how does it fit?) and to each source as a whole (Gibbs 2007, 35–57; Emerson, Fretz, and Shaw 2011). As scholars learn more about the field context, the types of ideas they trace and codes they assign will likely change – and they should reflect on what those changes suggest for their analysis and argument.

Taking these steps while gathering material in the field is more efficient (and less daunting) than poring through pages and pages of interview transcripts, or hours of video, months later. It can also spark sharp insights and expose connections between sources and among pieces of information, facilitating intellectual progress. As they carry out these tasks, scholars may

also develop additional analytic strategies and tools to identify patterns or trends in the data and sources. For instance, they might develop a framework for processing and systematizing ethnographic observations into a series of analytic portraits, or create a preliminary index or concordance of particular words, concepts, or events and begin to identify patterns in the codes (Gibbs 2007, 73–89).

We offer a few examples. Using paper and pencil (as per the rules of the archive in which she was working), a researcher studying the effect of the media on political activism in Latin America systematically coded every tenth issue of a major national newspaper in each country under study for any information concerning activism, repression (or a relenting thereof), and nine categories of “taboo content.”¹² Another scholar studying presidential campaign strategies in Latin America through television advertisements began to code the 59 hours of tape he collected in the field on various parameters including the objective, form, style, and temporal focus of each advertisement.¹³ Both scholars conducted inter-coder reliability checks and kept detailed notes regarding their coding decisions.¹⁴

When appropriate and desired, scholars may code qualitative sources using quantitative or qualitative content analysis.¹⁵ Quantitative content analysis, which has a longer tradition (see, e.g., Holsti 1969), is “a systematic, replicable technique for compressing many words of text into fewer content categories based on explicit rules of coding,” or, more briefly, “a research technique for the objective, systematic and quantitative description of the manifest content of communication” (Berelson 1952, 74). Scholars can use quantitative content analysis to analyze both what is said and how it is said in a particular source, at the level of word, theme, or “item of communication” (i.e., article, speech, etc.). At its most basic, quantitative content analysis groups words and phrases into semantic categories and counts word frequencies, semantic frequencies, and the frequency of coding categories.¹⁶ Qualitative content analysis identifies ideas or themes by analyzing manifest and latent content, and other formal aspects and features of text (Mayring 2000, 4). Techniques for systematic

¹² Interview, DK-5, July 31, 2012. ¹³ Interview, DK-3, July 27, 2012.

¹⁴ For a useful discussion of using inter-reliability checks to validate conclusions based on interview transcripts, see Kurasaki (2000).

¹⁵ See the article symposium organized by Herrera and Braumoeller (2004) for an enlightening comparison of content analysis and discourse analysis.

¹⁶ Note that the technique has evolved considerably, and can now do much more than quantify (see, e.g., Neuendorf 2001; Krippendorff 2003; Franzosi 2008). Stockmann (2010) offers a useful discussion of using content analysis to analyze media content.

qualitative content analysis of texts (or qualitative document analysis, QDA) have been developed since the early 1980s (Mayring 2000, 1).

Over time, multiple types of computer software have been created that can assist with quantitative or qualitative content analysis – that is, that can help scholars to organize and manage, and systematically code and analyze textual data. Given that quantitative content analysis is the older tradition, many more software programs are available to assist with it (see, e.g., Skalski 2002, 225–226, for a discussion and list). Since the late 1980s, various computer-assisted qualitative data analysis software (CAQDAS) packages have also been developed to support textual interpretation, for instance Atlas.TI, HyperRESEARCH, MAXqda, NVivo, NUD*IST, QDA Miner, and win-MAX.¹⁷ Such programs have moved far beyond their “code and retrieve” origins to allow for the operationalization of complex procedures and approaches.¹⁸ A growing literature on their use, and an increasing number of web-based resources¹⁹ and web-based training sessions,²⁰ are becoming available.²¹

Field researchers considering content analysis should evaluate the potential benefits and limitations of the available techniques and software far in advance of fieldwork. It may only be possible to procure their preferred software in advance of leaving for the field, and learning to use it may be time-consuming. The literature on CAQDAS considers a range of issues related to using automated content analysis, and the costs and benefits of employing computer-assisted coding (see, e.g., Barry 1998; Fielding and Lee 1998; Bourdon 2002; Gibbs *et al.* 2002; Lu and Shulman 2008); the strengths and weaknesses of different CAQDAS programs and how to choose among them (see, e.g., Barry 1998; Bong 2002; Thompson 2002; Gibbs 2007; Lewins

¹⁷ Beyond these off-the-shelf programs, open-source web-based suites of tools are also being developed, such as the Coding Analysis Toolkit (CAT), a free service of the Qualitative Data Analysis Program (QDAP) hosted by the University of Pittsburgh’s University Center for Social and Urban Research and the University of Massachusetts, Amherst’s College of Social and Behavioral Sciences (www.umass.edu/qdap/). The Public Comment Analysis Toolkit (PCAT, <http://pcat.qdap.net/about.aspx>), a cloud computing platform, facilitates web-based collaborative text analysis and is particularly good at analyzing and categorizing small pieces of text (such as electronic comments); more generally, see the eRulemaking Research Group at the University of Massachusetts, Amherst (<http://people.umass.edu/stu/eRulemaking/index.html>).

¹⁸ Fielding and Lee (1998, 199, 202) and Gibbs, Friese, and Mangabeira (2002) discuss the evolution of these programs. See also Mangabeira, Lee, and Fielding (2004).

¹⁹ See, e.g., http://onlineqda.hud.ac.uk/Step_by_step_software/index.php.

²⁰ See, e.g., <http://www.qsrinternational.com/training-and-events.aspx>.

²¹ In addition, the National Science Foundation has sponsored workshops to introduce political scientists to text analysis (see, e.g., Tools for Text – <http://toolsfortext.wordpress.com/> – at the University of Washington).

and Silver 2007); guidelines for use (e.g., Kelle 1995; Mayring 2000; Seale 2002; Lewins and Silver 2007; Hermann 2008); the relative merits of quantitative vs. qualitative content analysis (e.g., Mayring 2000); whether data produced via such analysis meets assumptions for statistical analysis of data; and how to pair CAQDAS software with other tools, such as geographical information systems (GIS) (Fielding and Cisneros-Puebla 2009).

Once they are in the field, scholars can begin to think more specifically about ways to use the software. The potential of qualitative data analysis software programs – in particular whether CAQDAS software programs are really only suited for data management or can also help scholars to interpret texts, examine relationships among concepts in a text,²² and produce qualitative analysis (Gibbs 2007) – continues to be debated. For some scholars, reading the excerpts produced as output by such programs (bits of interview transcript or full archival documents) can be unsettling. Furthermore, if the requested themes or codes overlap, certain points, passages, or paragraphs may be repeated in the output, amplifying their apparent importance inappropriately. Moreover, even the strongest proponents of such programs hold that they ultimately support rather than replace scholars' direct interaction with text (Mayring 2000, 18), and should be understood as analytic resources or tools to be selected and employed once scholars have identified their approach to and procedures for analysis (Fielding and Lee 2002, 197). As such, for scholars who do use these programs, those who are in the field for shorter periods of time may be more likely to use them more minimally to help organize the material they are amassing and creating (e.g., memos and notes),²³ while those on longer field stays may be more likely to use them more extensively to conduct content analysis (or textual analysis) and manipulate, search, and report on coded text (Gibbs *et al.* 2002, 11–12).

For scholars with more positivist leanings, a key to successful content analysis is that it be transparently rule-guided, with clearly defined coding categories and carefully established coding criteria. Evaluating the reliability of coding is also important – both its *stability* (the extent to which they can consistently re-code the same data in the same way over time) and its

²² Thompson (2002) argues strongly against the idea that the software can be used for this purpose.

²³ Chapter 3 discusses other organizational techniques. Examples of workflow applications include database programs (e.g., Access); bibliographic software (e.g., EndNote, Zotero, and Sente [Mac only]); and programs that manage digital files and facilitate the writing process (e.g., Scrivener and DEVONthink [Mac only]). Programs such as DMP Tool help researchers generate data management plans such as those increasingly required by funding agencies like the National Science Foundation and the National Institutes of Health. See also Healy's useful discussion (www.kieranhealy.org/files/misc/workflow-apps.pdf), and Long (2008) on organizing workflow around quantitative analysis.

reproducibility (the degree to which different people employing the same coding scheme code particular pieces of text in the same category) – given that the generalizability of the conclusions drawn from content analysis depends in great part on its reliability. Researchers should also try to assess the *accuracy* of their coding – the extent to which the classification of a text corresponds to a standard or norm statistically.²⁴ More interpretive scholars may see things quite differently. For them, the notion of coding being “accurate” makes little sense, as the ideas that emerge as information is collected in the field are by definition constituted, contested, and multi-valent. For all scholars, the reflective evaluation of data that they carry out as collection proceeds should be carefully documented, as the specifics will likely fade from their memories long before they return to their home institutions.

Scholars collecting quantitative data will also want to take steps to increase their accessibility and to understand them better. For instance, survey researchers may enter responses into a database as the questionnaires come in and, ultimately, use tools such as the online Survey Documentation and Analysis (SDA) system, the online data analysis system created by Dataverse, R, Stata, or SPSS to identify substantive trends in the data. Cleaning, reformatting, and standardizing survey data in the field can help scholars to identify problems with survey administration, and allow them to run potentially illuminating descriptive statistics and start to see what important variables look like. Time permitting, scholars may even begin to explore the relationships among critical variables through frequency tables, histograms, cross-tabulations, bivariate scatterplots and the like, or may run some preliminary analyses on a random subset of the data. What the scholar sees and learns can have implications for how they carry out the rest of the data-collection process.

Creating a dialogue with one’s fieldwork and data in these ways is undoubtedly thought- and time-consuming. For more than one scholar we interviewed, however, doing so became an enjoyable – even exciting – activity.²⁵ No matter what process researchers choose to employ in order to dig into their data, doing so in the field gives them an opportunity to further investigate ideas or dynamics they realize they do not understand, make helpful revisions to their research design, and begin to think about their

²⁴ www.colostate.edu/Depts/WritingCenter/references/research/content/page2.htm, accessed July 8, 2012.

²⁵ Interviews, DK-13, August 8, 2012; DK-14, August 10, 2012.

data in a more integrated, holistic manner. That is, as scholars organize, examine, code, and compare their data, and consider the recurrent or aberrant observations, categories, or themes they observe (and what is absent), they can begin to reflect on what questions the evidence raises that might complicate their analytical framework, which data seem most applicable to each component of the analysis, and how well their initial findings or insights relate to the middle-range questions posed in the study, as well as the broader questions that motivate it. Writing in the field can help them to do all of these things even more efficiently and effectively.

Writing and presenting work-in-progress

During short field research trips, coding, processing, and evaluating data may be all that time allows. But, particularly on longer field-stays, researchers may have the opportunity for more advanced analysis. Beginning to think synthetically across the project, bringing together different strands of evidence, and generating or developing their arguments while in the field context can help scholars to motivate, organize, and discipline their work. For instance, they might ask themselves some of these partially overlapping questions: How well do the data fit with – or how thoroughly do they contradict – hypotheses or arguments developed before entering the field (or since arrival)? What rival arguments do they refute – or support? Have the causal mechanisms underlying long-standing or emerging hypotheses and arguments been identified, and do observed causal processes line up with the hypotheses? Have the observable implications of hypotheses and causal mechanisms been assessed? If scholars are using process tracing, what are process tracing tests revealing about the arguments (see, e.g., Falleti and Lynch 2009; Bennett 2010; Collier, Brady, and Seawright 2010, 184–196; Gerring 2010)? Stepping back from the field helps scholars to select the appropriate analytic tools and begin to employ them to develop broader themes and arguments.

Further, and particularly if scholars can engage in the type of analysis just mentioned, it can be extremely beneficial to put pen to paper, or fingers to keyboard, and begin to write.²⁶ The idea of writing in the field may sound exciting to some – a way to mark progress. For others it may inspire trepidation. For all parties, we hasten to emphasize that writing can take

²⁶ Indeed, funders sometimes require some accounting of the research process or narrative report.

many forms, not all of which are meant for wide circulation. For example, researchers may find it useful to compose memos, even just to themselves, that link together some of their observations, or develop parts of the emerging story (or stories). They might summarize one or more cases (no matter what “case” means for them) or compose short narratives analyzing particularly telling episodes or anecdotes the research has unearthed.

Beginning to write in the field – starting to integrate the information scholars are gathering into their evolving analytic framework – forces them to think through how to draw descriptive and causal inferences. Of the many examples they have of a particular phenomenon, which one or two are the most illustrative, meriting discussion in detail? How can different forms of evidence be brought to bear simultaneously as they seek to make particular points? Precisely how (by what logic) do elements of their data – passages from interviews, constitutional clauses, experimental results, and the like – support their arguments, contradict them, or support rival accounts? And how can those connections be clearly expressed in writing?²⁷ Taking early stabs at drawing such analytic maps in the field will give scholars a leg up when it comes time to fully develop and formalize their descriptions and explanations.

As we have noted, in addition to beginning to write out their analysis, scholars should also compose detailed summaries of their research procedures, and make some initial attempts to articulate how their fieldwork led them to the descriptive and causal inferences they have drawn and to their analysis as a whole. Clearly and completely documenting – and justifying – the context in which data were collected, the choices made while collecting them (for instance, concerning case selection, sampling of interview respondents, data-capture strategies, etc.), and the procedures used to do so are critical elements of research transparency. Scholars can also begin to write out clear descriptions of the contributions field research made during each phase of the research cycle – for instance, documenting the procedures they used to measure variables, determine the validity of measures, and develop and test hypotheses. Such documentation is most easily and effectively produced in the field rather than months later when the details of such choices have become cloudy. That is, the benefits of field research are more present – and more easily identified and described – when scholars are in

²⁷ Scholars whose ability to make these connections clearly is constrained by word limits dictated by the venues in which they wish to publish (as is often the case for qualitative scholars) might consider adopting active citation; see Moravcsik (2010, 2013) and Elman and Kapiszewski (2013).

the field than at any other moment. Being transparent in these ways, we submit, is an important principle of good field research.

Engaging in the kind of higher-order, synthetic and critical reflection necessary to write about these issues is intellectually challenging and can also be nerve-wracking (although it can be equally nerve-wracking to avoid doing so). Hovering above the detailed information being collected and the knowledge being built – gaining sufficient perspective on the project to think and write coherently about the big picture (what we have referred to as “the forest”) – is hard. Doing so likely requires scholars to set aside time in their calendar and grant themselves permission to take a break from the regular business of data gathering. Initial gear-grinding notwithstanding, delving into this process early in field research and returning to it regularly can result in it becoming a familiar and helpful task, rather than a chore that gets put off until it is too late for it to shape day-to-day decisions about data collection.

Researchers often share their work-in-progress with others, and even formally present it, while in the field. There are many different ways to share one’s research, and each can provide critical motivation as well as feedback. For instance, scholars can engage in informal discussions with the individuals and communities who participated in the study, and investigate ways to present their analysis and writing (even in preliminary and imperfect form) to them. Providing study participants (interview subjects, local research assistants) with an opportunity to interpret and react to one’s analysis before it is written up and published can be intimidating, as they may resist or challenge one’s interpretations. It is important to bear in mind that such disagreement does not necessarily mean that the scholar misunderstood or is wrong. Scholars should also guard against such preliminary discussions leading to their “cooptation” or discouraging them from making critical statements. As Schram and Caterino (2004, 20) note, scholars can and should maintain “a powerful critical connectedness,” continuing to think analytically while being fully engaged. Yet researchers certainly learn from such dialogues. Including these other voices in their final research products (using attributive tags or describing the types of people or communities who presented these views), candidly acknowledging how their and their subjects’ interpretations of the same dynamics or phenomena were in tension or conflict, can be very enlightening for readers.

Graduate students may share their evolving ideas about their analysis with their dissertation advisors, perhaps sending periodic “missives from the field” (a few paragraphs or several pages in length) describing how the research is

progressing and highlighting questions and concerns. More advanced researchers may present preliminary versions of their ideas and findings to academics based at local institutions, or other scholars who have worked on the same kinds of topics or materials. The researcher's host institution (if she has one), or other local universities, think-tanks, or discussion groups, can also provide fora in which to make presentations and bounce ideas off fellow researchers and others who are in a good position to provide reactions and insights. Finally, a scholar might write up versions of her work to present at workshops or conferences, or to submit to a research institute as a working paper or to a journal as a research note. All of this has the great benefit of pushing the researcher to spell out – in concrete terms and complete sentences – the ideas that are taking shape in her head. Moreover, signaling to advisors or colleagues that progress is being made may deepen their interest in and support for the project. Most importantly, feedback received in response is timely: the researcher is still in a position to make good use of it in adjusting the direction of her field research as necessary.

Trouble-shooting and retooling

A field research project in which everything runs according to plan, without unexpected twists, turns, and moments of agonizing self-doubt, is a rare occurrence. Rather, it is common for things to go awry in ways small and large. While plenty can go wrong logically and operationally when one is living and working in an unfamiliar environment, we focus here on some common intellectual and analytic forms of trouble that can crop up in one's research. Practically every researcher adjusts some aspect of her project in the field: very few researchers execute to a "T" the project they described in their dissertation prospectus or mapped out in a grant application prior to leaving their home institution. Scholars making minor adjustments yet still operating within the main framework of the original research design should discuss such changes with colleagues, carefully consider their implications for other aspects of the project and for the claims they ultimately hope to make, fully document the contours and justification for each change, and seek to keep their data-collection plan in line with their evolving design choices.

While the utility of modifying some aspect of their project dawns on some researchers gradually, for others the need for minor changes jumps right out. Consider a project one of our interview respondents described, concerning education in post-conflict Bosnia and Croatia. In Bosnia, the researcher

studied schools in six towns that varied with regard to type of school curricula and population demographics (two towns were mono-ethnic, two were evenly divided between ethnicities, and two were dominated by one ethnicity but had a sizable population of the other). When the scholar arrived in Croatia, however, she realized that towns with parallel population demographics did not exist: Croatia was mostly Croat with pockets of Serbs. Consequently, she needed to build her sampling frame differently in Croatia in order to develop a similar comparison. She oversampled towns with many Serbs (so they would not be missed in the sample), and chose one with a large population of Italians that had both a Croat-language school and an Italian-language school (in order to compare the experiences, across the two contexts, of Croats attending schools in which the language of instruction was not their own).²⁸

Sometimes researchers experience disruptions that seem more threatening to their project and daunting to resolve, however. They may have the sensation, as they begin to collect data in the field, that things are quite different from what they expected, and that their prior assumptions are wrong. They may encounter major obstacles to collecting data they believed would be readily obtainable. Knowledgeable interviewees might laugh at the ideas they have developed and come to cherish about the politics of the locality. In other words, scholars might feel as if their project is “broken.” As notes of disillusionment start to creep into their thinking, alternative research topics may begin to look more appealing than the one they had in mind when they set out.

Most often these or other forms of dissonance and self-questioning do not signal a research crisis. What appear to be big problems can actually be big opportunities to rethink particular aspects of a project or even the theoretical framework. While on rare occasions field researchers have abandoned their project *in toto*, mid-stream, and continued with an entirely new question and theoretical framework, more commonly relatively small adjustments suffice to get a project that seems derailed back on track. Things often work themselves out as researchers learn more, speak with a broader assortment of people, identify different routes to the kind of data they need, and become more comfortable in and knowledgeable of the field setting. Of course, scholars should not cling intransigently to an unworkable plan. As we have emphasized, fieldwork often entails a good deal of iteration, and flexible discipline is a key principle of good field research. Significant changes

²⁸ Interviews, DK-6, August 1 and 30, 2012.

sometimes do need to be made. Nonetheless, engaging in incremental modifications to one's project first, setting (and sticking to) reasonable deadlines for resolving difficulties before contemplating large-scale alterations, and extensively considering all aspects of such changes before making them, are good rules of thumb.

As scholars consider what to do, staying on an even keel and remaining patient (but avoiding paralysis) are important. They should seek to carefully diagnose the problem and what is causing it, and do their best to ensure that the "fix" under consideration addresses the problem instead of making things worse. We cannot overestimate the importance of *talking with others* – trusted peers, advisors, local scholars, or whoever else could help – while seeking to identify the source of the problem and the optimal fix. No matter what challenge one is facing, many other researchers have faced comparable problems and experienced similar kinds of uneasiness and self-doubt, and most have found ways to amend their projects productively. Clearly articulating the problem and discussing it with other academics can often lead researchers to hit upon a solution themselves.

The kinds of problems that political scientists generally encounter in field research often fall into particular categories. We identify a critical set in Table 10.2. The first type of problem is as fundamental a challenge as one is likely to face: the researcher cannot answer her question. On the one hand, the root cause of the problem may be practical, involving problems obtaining needed data. Perhaps the library containing an essential collection just closed for a year of renovations. Or the newspaper back-files she planned to scour are only spottily available. Or she has trouble meeting the kinds of people she planned to interview. Or the government ministry in which she hoped to conduct extensive inquiries brusquely rejected her overtures.

If access to data is the problem, a patient strategy of building the kinds of networks and trust that can open the right doors, as discussed in previous chapters, may be the fix. If the sources being sought are truly beyond reach, or at least not available within a workable time-frame, the scholar should carefully investigate the kinds of information that *are* available, and determine what sorts of substitutions will work. For example, if the initial plan was to obtain finely detailed original reports from local officials, perhaps less detailed provincial-level summaries or yearbooks would suffice.²⁹

²⁹ Changes in data-collection technique can also occur because scholars realize that something they did not expect to be able to access *is* available. A scholar studying presidential campaign strategies in Latin

Table 10.2 Trouble-shooting and retooling

Problem	Possible causes	Possible fixes	Should I change my topic?
I can't answer the question	1 Inability to obtain necessary data/information 2 Unanswerable or poorly specified question	Explore alternative approaches to gathering the data, or alternative types of data Recast, tighten, or sharpen the research question	Only if all approaches would produce wholly inadequate data Only if no re-specification of the question works
I'm surprised by the answer, or my hypotheses seem wrong	1 Researcher is not getting the full story 2 Initial hypotheses were wrong 3 Theories in which the project is framed are poorly suited to the subject	Employ strategies to deepen and broaden information gathering Develop / return to alternative hypotheses and/or work with the new direction in which findings are pointing Seek to reframe the topic within a different theoretical approach	Only if no adequate avenue to gather information opens Only if nothing of value can be gained from pursuing the question in its current framing Only if every effort to reframe topic is unsuccessful
I'm losing interest in my project	1 Root problem is one of the above conditions 2 Project is fine but researcher is bored or burned out 3 Research question is out of step with empirical realities	(See above)	No Take a break, streamline the work flow, and/or re-motivate Return to original impetus behind the project; reformulate research question

Source: adapted from a table presented by Julia F. Lynch in the modules on field research at the IQMR.

Researchers may also replace data-collection techniques that have proven suboptimal. One strategy is to move away from interviewing toward the use of more site-intensive methods. For instance, one of our respondents who was studying informal workers in Latin America began data collection by interviewing leaders of street vending organizations with a formal protocol of questions derived from the literature on the informal economy. Recognizing that the terms she was using did not apply to street vendors' reality, meaning that continuing with those interviews would produce superficial and likely misleading data, she instead initiated more free-wheeling conversations with vendors, ultimately engaging in something more closely resembling participant observation.³⁰

On the other hand, it is possible that the reason why a scholar cannot answer his research question is because the question itself is poorly specified. Perhaps the question has not been asked in a way that it can be answered. Or perhaps the variables inherent in the question have not been operationalized in a way that provides a workable roadmap for collecting the kind of data that are needed to answer the question. If so, then on the basis of the researcher's growing familiarity with the field site, and in consultation with peers and advisors, she may be able to recast, tighten, or sharpen the research question.

Another form of problem arises when the researcher has begun to develop an answer to his question, but that answer brings challenges of its own – surprising him, or suggesting that his original hypotheses were wrong. This outcome could result from a few conditions. The researcher may not yet have dug deep enough – interviewed sufficient numbers of people, found the right documents – to get the full story. If he believes this may be the cause of the problem, persisting and drilling through the surface will help him to accurately assess the plausibility of his original hypotheses. Alternatively, the researcher may not have been looking at or thinking about the topic in the most intellectually productive way – or may simply not have known enough about it – preventing him from developing the optimal research design. While this may feel like a setback, it is critical that the scholar not turn a blind eye to evidence that suggests that his hypotheses are wrong. The goal, after all, is to develop a valid answer to the research question.

America was unexpectedly able to access full sets of videos of candidate advertisements from multiple past elections, allowing him to extend the temporal scope of his project (interview, DK-3, July 27, 2012).

³⁰ Interview, DK-1, July 20, 2012.

Discovering information that falsifies initial hypotheses and suggests different explanatory leads to pursue constitutes an exciting step toward that end. A final possibility is that not just a researcher's hypotheses, but the theories around which he designed his study, have turned out to fit poorly. If he decides this is the crux of the problem, he may need to engage in a farther-reaching overhaul of the project, reframing the topic within a different theoretical approach.

A final type of challenge, which may be more likely to occur during longer field trips, arises when scholars lose interest in or become detached from their project. Again, this challenge can have multiple causes. It may stem from one of the obstacles discussed above (and may thus be solvable through the steps we just outlined). Or it could be that the project is fine but the researcher is burned out. What may help in this situation is for the researcher to take a break from the project and allow herself to come back refreshed and remotivated. Most seriously, this challenge could spring from a deep-rooted dissatisfaction with the research question, or the researcher discovering that the way in which he has been looking at things is out of step with the empirical realities he is finding.

Under these conditions, a searching, top-to-bottom reconsideration of the project – though not necessarily a radical change of topic – may be called for. The scholar might start by returning to the original impetus behind the project and seeking to reformulate the research question in a way that still draws on that original motivation but fits better with the reality he has found in the field. For example, Bleck initially focused her dissertation research on evaluating the effect faith-based versus secular education had on voting behavior. However, she soon realized that the ways in which people thought about political participation were quite different from how she had theorized the outcome: a good deal of political mobilization was occurring outside of voting. As a result, she broadened her research question and ultimately included questions about non-electoral forms of political behavior in her survey and interviews.³¹

In sum, when faced with what seems like a research crisis in the field, we suggest scholars take the following steps: identify the type of problem that has arisen, pinpoint its root causes, and then cope with it in a way that is direct, reflective, and constructive. Of course, the trouble that any

³¹ Recounted by Jaimie Bleck in a presentation entitled "Education, citizenship and democracy in Mali" at Indiana University on October 3, 2013.

given researcher (or his or her students) encounters in the field may not precisely match one of the three categories we have outlined. Nonetheless, trouble-shooting problems that arise in the field *while still in the field* offers scholars an opportunity to work through important conceptual, inferential, or theoretical issues while they can still modify data collection to support their revised project.

Just as stasis or rigidity are rarely the solution when significant problems are encountered, throwing the project out and starting over from scratch are likely called for in only a very limited set of circumstances: as readers will have noted, the answer to the question posed in the final column of Table 10.2 – “Should I change my topic?” – is *never* a simple “yes.” Generally one is best off pursuing a re-worked or considerably adjusted version of the planned project – as the multiple ideas in the “possible fixes” column attending each problem suggest. We hasten to emphasize that the fact that almost all scholars’ projects change *does not mean* that planning should be abandoned! In fact, having a detailed plan can help scholars to diagnose precisely what has gone wrong where, which facet or facets of the project need to be modified to address the problem, and what other parts of the project that “fix” might affect.³²

Assessing progress: when is enough enough?

No matter whether they are on a fieldwork trip of a week’s duration, or one that extends into many months, scholars can lose perspective on the project as a whole, and lapse into a state of single-minded focus on gathering information and resolving the challenges that attend that quest. We might term this kind of tunnel vision “field goggles.” For instance, field researchers might continue to gather more and more information of the same kind – conducting more interviews, grabbing more archival documents, or scanning more newspaper articles – even if the information thereby gained is redundant or only marginally concerns the topic or concepts on which the project focuses. Or they might track down an infinite series of leads and contacts, whether or not they contribute tangibly to the project, and regardless of whether they will have time to interact with them. Alternatively, they may become fixated on the micro-level problems, hassles, and challenges of the

³² Interview, DK-13, August 8, 2012.

data-accumulation process, disregarding larger questions – for instance, concerning the uses to which the laboriously collected data will be put.

Such behavior can go hand-in-hand with other problems: a sense of burnout or ennui; feeling adrift and disconnected from one's advisor, colleagues, or collaborators; and an aversion to thinking about where the project as a whole stands and what will happen after returning from the field. Such issues can be exacerbated by other complicating factors, such as trouble with housing or funding, or disruption in one's family or personal relationships. While it is natural (and beneficial) to become immersed in fieldwork and engaged with the context, slipping into less-than-fully focused research for long periods poses real dangers. Getting into a data-collection rut can mean squandered opportunities and wasted time, and may spell trouble later if the heaps of data the researcher is tirelessly collecting ultimately do not help him to answer his question or adjudicate among rival arguments.

Of course, there is no way to avoid getting absorbed at points in what we have called “the trees” – the minutiae of data collection and digestion. Resolving lingering data-access problems, and making micro-level analytic progress (e.g., by working through a long list of newspaper articles that one has sampled, or trying to piece together every minute detail of a particular event from a series of sources) are important. Indeed, well-reasoned decisions and small victories on this level are the stuff of “good days” during field research. But researchers need to keep these tasks in perspective. The activities one carries out in the field are, after all, a means to an end, not an end in themselves. The execution of such tasks needs to remain connected with “the forest” – the overall project and the broader goal of answering the core questions under investigation. Researchers should continually seek to assess how close they are to clearly envisaging, and to having the necessary support for, the answers to their questions and the claims they wish to make.

But how can such assessments be made? How can scholars know when they can confidently answer “Yes!” to the perennial question, “Have I collected enough data?”³³ The best way to keep tabs on headway is to evaluate progress periodically at *both* the micro and macro levels. For instance, continuing to develop and update their initial data-collection plan (discussed in Chapter 3) as fieldwork progresses – consistently seeking to

³³ Of course, not all field research is infinitely open-ended. For many scholars, circumstances – the fact that they can only be away from family for so long, or grant or visa limitations – will dictate when they are finished. These scholars face a somewhat different problem: developing and writing up their project based on the data they were able to gather during what may have been a circumscribed period of time in the field.

affirm the connections, big and small, between data collection and analysis on the one hand, and the core elements of the project on the other – can help scholars assess progress and keep research on track. By periodically tallying up what information has been collected and comparing it with the current list of “items to get,” researchers can determine whether enough data have been gathered, from sufficiently different sources, on all relevant variables, causal mechanisms, and causal processes, so that each can be reliably and validly measured or evaluated across cases.

Assessments concerning whether the researcher has collected sufficient appropriate data to meet his analytic needs must be made in relation to the specifics of a given project.³⁴ Nonetheless, we suggest a few pointers. First, it can be useful for a scholar to carefully distinguish between data he absolutely must collect in order to answer his question effectively, and data it would be beneficial to have but that, in a pinch, he could do without – because they are not critical to measuring or assessing his key variables, concepts, ideas, or main hypotheses, or substantiating his central argument. Second, of those critical data, scholars should determine which are only available in the field site and which might be found elsewhere (on the web, in reference libraries that are accessible from their home institution, etc.). As we have noted elsewhere, as more and more material is placed online, the boundaries of what information can only be obtained through field research are shifting.

Scholars should also keep in mind that they have several options if they discover that they are missing crucial data after they return to their home institution. They can dig and re-dig through the materials they collected to see whether some data or data sources, looked at in a slightly different way from how they had envisioned, could fill in any lacunae that they identify. They can also double check whether access to the missing data is possible from home. They might also ask their former research assistants or other local contacts for help. For example, after Kapiszewski returned to the United States from dissertation research, she realized that she needed statistics on the Brazilian Supreme Court’s case load that she had neglected to collect while in the field. A Supreme Court clerk with whom she had spoken various times found all the data for her and sent them to her electronically. Read asked an undergraduate from his home institution, who happened to

³⁴ Indeed, for some projects it is quite obvious when data collection is complete; the scholar seeking to collect all of the videos showing presidential candidates’ advertisements in previous elections, for instance, had a list of all the advertisements, making it patently obvious when he had collected the final video (interview, DK-3, July 27, 2012).

be living in Taipei for language study, to spend a morning in the National Taiwan Library imaging pages of figures that he had come to realize he needed. Further, the possibility of going back into the field should not be dismissed. Taking a quick, targeted trip (perhaps as a junior faculty member converting a dissertation project into a book) some time after one's main forays can be extremely productive. One scholar we interviewed, for instance, was unable to complete his research on presidential elections because the final contest in one of his country-cases went into an unanticipated second round; he did follow-up research, however, when he attended an international conference in that country a year after returning from his main research trip.³⁵ If all else fails, scholars may be able to work around missing information, perhaps acknowledging the gap in their write-up but demonstrating that they are nonetheless able to make their points or advance their argument.

If checking data-collection progress against their data-collection plan can help scholars assess where they stand with respect to the trees, additional steps are needed to determine where they stand with respect to the forest. Engaging in the kinds of analysis and writing discussed above – digesting and analyzing data as they come in, *thinking* about them, and placing them within the project's analytic architecture – can help scholars to evaluate their progress on the more macro level. They may ask themselves, do I have the data to evaluate my initial hypotheses, any new hypotheses I developed, and alternative or competing hypotheses? Have I developed a clear, succinct, and well-supported argument? If I were to start writing now, what would be the organization of my book or dissertation, or the subheadings of my article or chapter? Do I have sufficient information to flesh out those chapters or sections? Critically reflecting on – and perhaps writing out – the answers to these kinds of questions can help researchers to calculate what else needs to be done in order to wrap up field research.

Depending on the kind of project, other forms of self-assessment may be appropriate. For exploratory modes of field research in which the purpose is to lay the groundwork for a future project rather than to answer a specific research question, for instance, a scholar might ask herself whether the topic or issue that will frame the proposal or prospectus has been clarified? Is the dependent variable, or the outcome to be explained, clear? Have I uncovered something surprising so the research question can be posed as a puzzle? How feasible will it be to collect the information needed to answer the question?

³⁵ Interview, DK-3, July 27, 2012.

Have cases to explore been selected? Trying their hand at developing a plausible data-collection plan can help scholars engaging in exploratory research to see how far they have come in their formulation of the project; that is, constructing such a plan might help scholars to gauge the endpoint, rather than serving as the starting point, of exploratory field research.

We close with two points. First, significant benefits can accrue from reaching out to others when trying to assess progress. Scholars familiar with the field context can help with assessing the likelihood of collecting (or may have ideas about how to collect) “still-to-get” data, for instance. And advisors or colleagues far-removed from one’s project can often infuse the evaluation process with some bigger-picture perspective. Second, researchers typically do not end up needing as much information as they feel compelled to collect when they are knee-deep in the field. Indeed, it is very common for researchers who have returned from long months of fieldwork to lament the amount of material they collected that sits unanalyzed in cardboard boxes or on their hard drives. Scholars would do well to keep this in mind as they balance the utility of potential data sources against the days or weeks it may take to collect them.

Wrapping up and transitioning back to the home institution

As we have sought to emphasize throughout this book, field research is an iterative, non-linear process composed of overlapping stages without hard boundaries. Scholars can and should continue to design field research while they execute it; analyze data while they gather them; and write up their observations and insights as they learn. We continue in this vein here, highlighting the link between critically assessing progress and winding things down in the field on the one hand, and (re-)initiating operations in the home institution on the other. And we offer strategies for handling this critical transition smoothly while maintaining research productivity.

The final weeks or days in the field can easily become a harried tangle as the researcher tries to gather last bits of information, schedule final interviews, say farewells, and handle the logistics associated with packing up and leaving. Nonetheless, there are ways to impose order on the pre-departure rush, and to facilitate departure itself. For instance, at this point in field research the temptation might be particularly strong to switch into full-throttle data-gathering mode, postponing routine organizational tasks such as transcribing interviews, penning and sending final thank-you emails, fleshing out field notes, and labeling digital images of important documents.

Yet such tasks are harder to do effectively as time passes, and the days or weeks after scholars return to their home institution will be no less hectic than their last moments in the field. As such, it is important to carry out such key clean-up duties prior to departure. Just as crucial are efforts to get re-attuned to the rhythms and deadlines of the home institution, and pre-arrange things that will be needed upon return: office space, syllabi, textbook orders, and the like.

Even if scholars are able to employ these management strategies, particularly with research trips that have lasted several months or more, transitioning away from the field setting and back to the home institution is disruptive, involving uprooting and replanting processes that consume time, attention, and energy.³⁶ Relocating entails most of the usual hassles involved with moving, but also gives rise to less tangible trials. On the level of daily routines and social relationships, returning to one's home institution means stepping out of one world and into another, which almost invariably occasions emotional and psychological dislocation, and cultural and financial jolts. For graduate students, the transition usually means moving back *down* the totem pole from the lofty heights of being solo PI to being a student receiving feedback from, and required to report to, faculty advisors.³⁷ For faculty, returning from the field entails facing the demands and pressures of their home institution: teaching obligations, expense reports, and perhaps colleagues who feel returnees owe committee service after having been away. Finally, it means reorienting to a new phase of the research project.

From the perspective of project management (and intellectual continuity), a key goal is to recommence the analysis and writing processes as soon as possible. Doing so allows scholars to build on the creative energy and vivid images still lingering from the field,³⁸ and helps to prevent the transition from field to home institution from generating a long productivity gap. While this point in the project is a natural time for a break, it is important to keep up momentum lest a well-deserved period of rest evolve into extended wheel-spinning. Doctoral students in particular often consume months and months after returning from the field “organizing” the

³⁶ While many of the points in this section will be most applicable to scholars for whom the field setting and home institution are located in distinct locales, many may also apply to scholars who are transitioning from more of a focus on data collection to more of a focus on data analysis without changing locations.

³⁷ Personal communication from a graduate student who had just returned from field research, October 6, 2013.

³⁸ Trachtenberg (2006, 183–197) offers some ideas about writing up historical projects based on primary data that are also applicable to scholars writing up more contemporary studies.

information they have collected before getting down to the task of writing dissertation chapters. Scholars working with wrenching questions on topics such as conflict or violence or poverty may find it particularly difficult to re-experience as they read back through their sources, digest their data, and analyze what they have learned.

Yet the root cause of delays and stalling is often scholars feeling overwhelmed by the analytic and intellectual tasks that lie before them. Doing fieldwork was one thing, they may think, but now they have to “say something smart.”³⁹ Indeed, to some degree it may be true that the skills that allow scholars to excel at fieldwork differ from those involved in drawing all of the information gathered together to make a theoretical contribution to the relevant literature. Moreover, while those engaging in purely quantitative analysis have something more of a template to follow – their variables and data to some degree suggest what model and method to use – qualitative or multi-method analysis is less formulaic.⁴⁰ In short, uncertainty about their ability to “say something smart” – and about *how* to do so – can be paralyzing for some scholars.

Initiating analysis in the field, we have suggested, can lay the groundwork and serve as a template for continuing forward, helping scholars to get going and gain momentum in this new phase of the project. Yet there are other things researchers can do to carry on and stay motivated. To begin, it can be a good idea to plan out (and write out) a timeline for completing the written product they hope to generate on the basis of their fieldwork, including some milestones to hit within a week, two weeks, a few months, and six months of returning from the field. These milestones might be administrative, organizational, social, analytical, or compositional, among others. Based on that schedule, scholars can assign themselves discrete tasks to do each day or each week in order to achieve those goals.⁴¹ The idea is to have a concrete way to document continued progress (or highlight a lack thereof) toward organizing and ordering information, thinking through data and drawing conclusions, developing an argument within the relevant theoretical frameworks, and creating a research product.

One set of initial goals might relate to dispatching any residual administrative tasks that were not completed in the field. A related set of goals might

³⁹ Interview, DK-15, August 21, 2012. ⁴⁰ Interview, DK-7, August 1, 2012.

⁴¹ As a general guideline, scholars might budget one or two months per dissertation or book chapter – and at least a year to complete a dissertation or book manuscript (once they are spending most of their time writing).

concern making sure that electronic and hard-copy data are organized in an intuitive way so that sources can be easily inventoried and accessed. Scholars might set themselves clear deadlines for assessing how confident they are in their initial coding schemes and considering whether a switch to (or away from) coding software might be warranted; for obtaining, learning, and starting to use any data analysis software they elect to employ; and for transcribing, coding, entering, or cleaning particular tranches of data. It can also be extremely useful for researchers to nail down – and write down – all relevant methodological details, assembling the notes created as choices were made in the field into one clear, coherent document.

With regard to professional relations, graduate students should seek to reconnect, and start sharing thoughts and ideas, with advisors promptly – even if (perhaps especially if) they remain uncertain about how the multiple pieces of their project fit together. It is self-defeating to lie low in the belief that they will make a better impression once they have it all figured out. Likewise, more advanced scholars might reach out to colleagues to debrief. Graduate students might also create, or join, a writing group consisting of students from their own subfield or various subfields. Such groups can provide useful feedback, reveal what is interesting to others and how they respond to evolving ideas, and establish deadlines to hit. In a similar vein, faculty might arrange an ongoing “draft exchange” with other faculty. More generally, graduate students and faculty alike should hasten to reintegrate into their broader scholarly networks – through attending conferences, re-subscribing to listservs from which they unsubscribed in the field, starting to read blogs they had been neglecting, etc. All of these people and groups can serve as sounding boards as scholars strive to “get their head out of the field” and continue to formulate and seek to test their ideas about what they have learned.

Finally, with regard to writing, a useful first step is thinking strategically about *what* to write.⁴² Generating an annotated table of contents can help a scholar to get a holistic handle on the project, develop ideas about how to structure the final product, and think through how the data collected map to that structure. One political scientist we interviewed suggested that, to complement her table of contents, she wrote a one-page summary of what the argument for each chapter would be *and* what evidence she had to make that argument. Doing so forced her to sort through all of the data she had collected to identify those connected to the real core of what she wanted to say.

⁴² Numerous excellent publications offer strategies for making writing progress, for example, Sternberg (1981), Becker (1986), and Booth *et al.* (1995).

She talked this document through with an expert in her field to solidify it before beginning to write any part of her dissertation.⁴³ Yet starting big – by trying to develop the main argument of the piece one hopes to write based on data collected in the field, for instance – may ultimately backfire: if the argument does not come together easily (because the scholar has not completed sufficient analysis to develop it), she may put off writing altogether.

It can be better, both psychologically and intellectually, to begin with low-hanging fruit; after all, the sections of one's article or chapters of one's book or dissertation need not be written in order. Scholars might write (or continue writing) an evolving series of memos to themselves, for instance. They could start by writing up some manageable portion of the project as a freestanding paper. This might be an aspect they are particularly inspired to set to paper; or a facet they are certain will end up in their article, dissertation, or book; or a piece with which they are sure they can make a contribution to the relevant literature. Scholars who take this route might set themselves a deadline by proposing the paper for presentation at a disciplinary conference or similar venue. Alternatively or in addition, scholars may write pieces for non-academic audiences – for instance, the policy community or an NGO. One way or the other, they might aim to write a little bit each day, measuring progress in number of hours, number of pages, or some other way. By putting one foot in front of the other, even if ever so slowly, everyone can make steady progress toward their writing goals.

A final re-entry issue concerns the challenges of remaining connected to the field context. We can think of these challenges in several ways. Some scholars have a difficult time *fully extricating* themselves from the field site. They may have seen or heard or sensed or felt things that continue to reverberate in their mind and heart. Or they may have ongoing obligations that can be helpful and productive, or draining. Fairly and efficiently dealing with these ties – while trying to make analytic progress – can be difficult, and scholars struggling to devise strategies to do so should consult others who have experienced similar challenges. By contrast, some scholars may find the sudden severing from the field context disorienting, and may yearn for ways to stay in touch. Doing so can sometimes be simple and straightforward. Staying abreast of ongoing events in the field site can help them remain connected. Further, we mentioned previously how local contacts, collaborators, and informants can fill in data gaps that may emerge once one has

⁴³ Interview, DK-13, August 8, 2012; see also "Design: the key to writing (and advising) a one-draft Ph.D. dissertation" (www-users.cs.umn.edu/~carlis/one-draft.pdf, accessed September 1, 2012).

returned home. Digital communications technologies and online social networks can be particularly helpful in these regards.

A related question concerns how researchers can “give back” to a community or project participants *after* returning to their home institution. Researchers have often been criticized for taking their data and running; they may get promoted for publishing information they “extracted” from a community in what that community may view as an arcane and unreadable format, while the community gets nothing (Mihesuah 1993). Even in remote parts of rural Africa, some communities resent the lack of follow-through from previous generations of scholars. Beyond the current power inequalities this highlights, the downstream result can be the inaccessibility of particular communities for future researchers. One way to ameliorate this situation and to practice ethical commitment is for researchers to write up their results in a simple and concise format and make that product available for project participants and people from the communities they studied. Indeed, sometimes those individuals can suggest accessible and appropriate outlets, for instance web sites where findings may be posted or email lists through which material can be distributed to interested subscribers.

Remaining connected to the field context in some way often helps scholars to make the most of, and even enhance, what they discovered and developed during fieldwork. Bringing themselves “back to the field,” if only virtually or mentally, may help them to interpret and reinterpret data. Data are not objective pieces of information: they were created at a particular moment and place and gain meaning because of that context. Planning for the possibility of reconnecting with elements of that milieu, whether by retaining multiple means of contacting respondents or research assistants, or by taking detailed notes on the atmosphere, visitors, and contents of archives or libraries, *in addition to* those taken on the specific records or books they perused, can help scholars to continue to access the field site and its many complexities and dynamics even once they have left.

Conclusion

This chapter emphasized the importance of analyzing one’s data *as one is collecting them*. Based on a broad understanding of the notion of “analysis,” the chapter outlined multiple ways in which analyzing data in the field helps scholars to make good intellectual progress, arrive at meaningful interpretations, and draw strong descriptive and causal inferences. Concomitantly, it

addressed how particular aspects of research design – and sometimes even the basic architecture and aims of one's project – can and perhaps must be renegotiated as fieldwork progresses. It also offered a trouble-shooting guide to help researchers map a path from analytic problems to appropriate solutions. And the chapter demonstrated how scholarly imperatives such as building an argument, linking data and evidence to claims and conclusions, and connecting one's work to broader theoretical frameworks can fruitfully inform one's thinking, analyzing, *and writing* in the field. The chapter also offered some strategies for assessing progress, and transitioning from the field site back to the home institution.

Our biggest take-home message is that, to the degree possible, scholars should avoid the scenario of returning home with crates of papers or thousands of computer files and only *then* starting to try to make sense of them. Instead, consistently giving themselves the time and mental space to actively engage with their data *throughout* their time in the field – imposing order on the material that they are gathering, and identifying, carefully considering, and resolving practical and intellectual complications early on – can pay great analytic dividends.

Throughout, we have highlighted the fundamentally iterative nature of field research, and the non-linear nature of the broader research process of which it forms part. We have emphasized the importance, to all sorts of crucial analytic tasks, of the scholar critically reflecting on what she is learning about the field site and her topic as she engages with her research context or contexts. And we have continued to underscore the merits of flexible discipline: giving oneself the latitude to make well-reasoned, incremental changes to one's research design as one learns and analyzes in the field is a quintessential example of this critical principle of good research. And we have shown that documenting the analytic tasks carried out in the field – carefully describing how concepts were measured, data and hypotheses evaluated, and information aggregated to support an argument, and explaining why those tasks were carried out as they were, when they were – can help scholars to produce scholarship that is more transparent, in which they can more easily and clearly demonstrate the rigor and power of their research.

The future of field research in political science

We began this book by making the case for critical reflection and active discussion within the discipline of political science on the nature of field research and its role in the production of knowledge. With a few recent exceptions that we surveyed in Chapter 1 and throughout this book, most writing on field research methods comes from outside political science. Since the beginning of the twentieth century, anthropologists and sociologists have initiated and indeed dominated many of the scholarly debates on how to conduct field research. Yet, for decades, large numbers of political scientists from all subfields have engaged in diverse types of field research around the world. Accordingly, it is well past time for our discipline to become more vigorously involved in the dialogue about the practices and principles of field research. While this book draws on insights and ideas from other disciplinary debates, our main goal is to contribute to and accelerate discussion of field research within political science.

Whether, why, and how political scientists value field research depends in part on their epistemological priors. While many members of the discipline consider field research a sound basis for understanding the world and for building theory, some have their doubts. To be clear, this is not a simple dichotomy between scholars who recognize, and those who question, the value of field research. Even those who value fieldwork have different views on its contributions – views that reflect fundamentally divergent perspectives on how we know what we know about politics and the world, and hence how we learn about them. Discussions about field research inevitably connect to, and also enliven, disciplinary debates over the value of descriptive inference, the merit of case studies, and whether and how we should seek to generalize, explain causal processes, and interpret meanings.

Accordingly, we have sought to create a book that addresses this broad audience, offering a comprehensive account of what field research is in our discipline, how it is done, and why it is conducted. Rather than write this book narrowly for any one subgroup within the discipline, we have aimed to start an

inclusive conversation. In order to problematize the concept and practices of field research from multiple perspectives, we collected extensive original data on the fieldwork experiences of a wide range of scholars – reviewing published empirical scholarship based on data gathered from fieldwork, fielding an original survey of US political science faculty, and conducting sixty-two in-depth interviews with political science faculty and graduate students.

This chapter's next section summarizes the book's main arguments about the dynamics and conduct of field research in political science, which are buttressed by the findings of our multi-faceted empirical inquiry. The chapter then proceeds to examine how broader trends and changes in politics, technology, the discipline, and academia more generally might influence field research practices in the coming years. We close with a clarion call to the discipline, exhorting political scientists to “spread out,” to collaborate more around field research, to think and write more about field research practices and products, to re-envision graduate methods training, and to give greater institutional acknowledgment to quality field research. Each step would help to advance our overall objective: encouraging recognition of the tremendous and multi-faceted value of field research to the discipline of political science.

The nature, practices, and principles of field research in political science

Throughout this book, we have developed three main arguments about the nature, practices, and principles – and thus the role – of field research in political science. Here we recap more briefly our first two arguments concerning the commonalities that exist across diverse types of fieldwork, and how scholars' iteration among the many data-collection and data-analysis tasks they carry out in the field helps make fieldwork a powerful form of inquiry. Thereafter, drawing on the first two arguments, we elaborate more fully on our third, showing the ways in which a shared set of principles underpins good fieldwork across the discipline. Each of these arguments bolsters an overarching theme of the book: that field research adds significant value to political science scholarship, and to our understanding of politics around the world. The volume's chapters provide multiple examples of the many ways in which fieldwork creates such value. And, we note, confidence in this view was also expressed again and again in our interviews.¹ Repeatedly,

¹ It bears noting that, while we sought to interview scholars who had engaged in fieldwork *and* those who had not, the vast majority of our respondents had carried out some field research. That said, our

when the question arose of whether or not respondents would have been able to carry out their research projects without conducting field research, the response was a resounding “no!”² Our three primary arguments, then, are in part an effort to unpack and make clear the full range of reasons why, and the processes through which, the research activities that scholars carry out in the field add value to their scholarship.

Commonality within diversity

Our first set of arguments holds that, despite great variety in the contours, content, and conduct of political science field research, fieldwork in the discipline has a common center. To be sure, our research clearly demonstrates – and points made throughout the book illustrate – that no single, ideal-typical form of fieldwork dominates the discipline today. For instance, field research projects carried out in different settings tend to have divergent characteristics. Chapter 2 showed how projects conducted entirely in the United States and those including international locations tended to have somewhat different profiles; field research also can look different in democratic and authoritarian contexts, in rich and poor places, in urban and rural settings, and so forth. Projects vary in part with regard to the structure of the research: the number of trips across which the fieldwork is spread; the number of distinct locations or field sites visited; and the amount of time spent there. Some fieldwork is done on a shoestring, while some is financed by six-figure grants. And field research varies in terms of how collaborative it is – with regard to hiring research assistants (RAs) and working with colleagues and partner organizations, for example.

It is also the case that field research has changed over time. Compared with previous cohorts, political scientists today spend less time in the field and use less funding to support their research. Further, they tend to pair information collected in the field with more data acquired from other sources. Some field techniques have proven to be hardy perennials, including interviews, surveys, and what we call site-intensive methods (ethnography and participant observation), while newly emergent techniques such as field experiments are building a following. In short, no single template or stereotype adequately

interviewees did include scholars whose projects relied less heavily on data they collected themselves and more heavily on existing sources (e.g., LM-4, August 27, 2012; LM-7, September 2, 2012; LM-12, September 6, 2012; LM-14, September 7, 2012; LM-22, October 2, 2012; LM-23, November 8, 2012).

² For instance, interviews, DK-11, August 7, 2012; LM-5, August 27, 2012; LM-16, September 11, 2012.

captures field research in political science, and several of fieldwork's integral parameters are in motion.

This variation across types of scholars and over time has multiple sources. Perhaps most fundamentally, political scientists hold a broad range of epistemological positions: some are committed positivists and others are dedicated interpretivists (although, as we discuss below, the great majority lie somewhere in between). The diverse range of phenomena political scientists study calls for different modes of inquiry as well. One would not likely use the same techniques to study, say, the political beliefs of pre-World War II anti-colonialist leaders in India or Vietnam, and state-by-state trends in the effects of voter registration laws on turnout in the United States. The growing availability of digital data over time has likely affected the degree to which scholars ground their research in data they gathered in the field versus data that were available online. Differential access to funding may also matter to fieldwork styles: our survey data reveal that, on average, Ph.D. students at programs ranked among the discipline's top 20 obtain substantially more resources for international fieldwork than students in other programs.

Furthermore, political scientists' field research practices change over their careers and lifetimes. Many of our interview respondents related how the addition of a partner, spouse, or children in their lives (as well as health needs or challenges associated with growing older) changed the cost-benefit calculation of doing lengthy field research in faraway places, particularly in very remote and/or dangerous contexts.³ Similarly, faculty face competing pressures at different junctures to fulfill teaching and service obligations. More seasoned scholars returning to places where they have previously conducted research often operate very differently from how they did on their first forays due to the knowledge and connections previous trips helped them to develop;⁴ likewise, senior scholars may delegate more aspects of field research to RAs.⁵

On what basis, then, do we find a common center? To start with, field research of all types involves an array of recurring practical, emotional, ethical, and analytic challenges. Regardless of their epistemological leaning,

³ E.g., interviews DK-7, August 1, 2012; LM-2, April 14, 2012. In the life-history interviews conducted by Munck and Snyder, senior scholars of comparative politics disagreed on whether field research becomes more difficult to do as one's career progresses. On the one hand, Juan Linz contended that "established" senior scholars "can and should do fieldwork later in [their] career"; on the other hand, Philippe Schmitter explicitly cited his age as a challenge to continuing to conduct field research because of the tremendous amount of energy it requires; James Scott agreed that while it would be more difficult to do fieldwork in his mid-60s, he could do it (Munck and Snyder 2007, 187, 337, 368).

⁴ Interviews DK-17, August 24, 2012; LM-8, August 30, 2012; LM-9, August 30, 2012.

⁵ Interviews LM-2, April 14, 2012; LM-9, August 30, 2012.

subfield, substantive interest, or rank, political scientists inevitably confront at least some of these hurdles in the field. Put differently, *all* field research is difficult to do well, and effectively employing each data-collection technique discussed in this book requires significant preparation, practice, and skill.

Moreover, our empirical analysis reveals that, in coping with these challenges, field researchers in political science have shared instincts and tendencies, and draw on a common stock of wisdom that cuts across the discipline's presumed cleavages. With regard to epistemology, many (if not most) field researchers occupy a middle position on the positivist–interpretivist spectrum, eclectically taking cues from both ends and refusing to acknowledge what are sometimes conceived as absolute choices and irreconcilable differences between competing camps. Relatedly, field researchers often employ both qualitative and quantitative logics, sometimes infused with interpretivist approaches, whether in explicit or in unannounced ways. Qualitative work forms a part of the great majority of field research projects, but contrary to some impressions, field research is not an exclusively qualitative enterprise. Projects that include the gathering of quantitative data, through surveys, experiments, or other means, have their own particular characteristics and challenges but also share much in common with other types of field research endeavor. Finally, it is an atypical scholar who *just* conducts focus groups, or *only* does field experiments. Instead, political scientists tend to employ multiple data-collection techniques within the same project. This is, in fact, a well-established practice, not the result of a recent “mixed-method” fad in the discipline.

In sum, we find that most field researchers operate in a zone of overlapping common tendencies, in which positivists and interpretivists, quantitative and qualitative scholars, and political scientists of every subfield share a great deal. The commonality of our experiences and practices, despite the tremendously diverse nature of our field research experiences, has several important implications. First, it suggests that we ought to be able to – *and should* – sustain a discussion about fieldwork in the discipline. As an eclectic enterprise with a surprisingly common core, field research capitalizes on, facilitates, and potentially advances this dialogue across significant disciplinary divides. Indeed, in our interviews and in the open-ended questions in our survey of US faculty, respondents seemed eager to reflect upon, analyze, and talk at length about the field research they had conducted.⁶ Second, it

⁶ Although we were prepared to conduct the interviews in approximately 30 minutes, almost all interviews lasted over an hour and respondents noted that numerous topics remained untouched.

suggests that we ought to be able to – *and should* – work together across subfields and substantive areas much more than we do to develop and strengthen fieldwork practices, to devise strategies to capitalize on fieldwork’s unique value-added in our scholarship, and to develop a language that allows us to articulate more clearly what fieldwork contributes to the discipline.⁷ As we have emphasized and firmly believe, fieldwork is a common disciplinary good. Finally, the commonalities among diverse forms of fieldwork suggest that we ought to be able to – *and should* – identify shared principles that underlie and guide good fieldwork. We have taken a first step toward doing so.

Shared practices: data collection, data analysis, iteration, and layered learning

A deeper look at the commonalities shared by field researchers takes us to the second primary argument that this book has developed. Field research entails much more than simply collecting data. Rather, a scholar’s fieldwork tends to advance multiple analytical dimensions of a research project. Far from merely filling in empty spreadsheet cells, literally or figuratively, the data scholars collect in the field and the insights they derive from them feed back into core intellectual dimensions of a research project, often changing the way a scholar thinks about and designs her work. We thus advocate a reconceptualization of the meaning of field research as an inherently iterative process, in which scholars continually update key elements of their projects – including the question, concepts, research design, and theories – based on an ongoing analysis of information acquired in the field.

While conceiving of research as a linear succession of specific phases with fieldwork sandwiched between “research design” and “analysis” may be useful as a heuristic, this understanding of the research process does not reflect the dynamic complexity of fieldwork in the real world. Most of our interviewees noted that fieldwork has had far-reaching effects on their thinking, and on their analysis, during multiple stages in the research process. As one commented, “when you carry out field research, your brain makes connections in ways that it can’t from just reading . . . you absorb information in a more critical way because you’re using all of your senses.”⁸

⁷ Various interviewees lamented the lack of such a language, e.g., interviews DK-2, July 26, 2012; DK-4, July 30, 2012.

⁸ Interview, DK-7, August 1, 2012.

Another interviewee suggested that, while scholars might understand the words a subject or political actor says or writes, “without context and background [gained through field research], you have no idea of the *meaning* of what they are saying.”⁹ Fieldwork can also lead researchers to identify causal processes or enrich their understanding of complex causal pathways. One interviewee insisted that in the absence of field research, “you misinterpret data – you won’t understand the inter-connections and causal patterns,” in other words, you will not understand *why* your findings are statistically significant.¹⁰

Furthermore, scholars with whom we spoke described an extensive set of feedback loops. A scholar’s initial research question drives many basic research design choices, such as major concepts to employ, hypotheses to investigate, sites to visit, and information sources with which to start. But once fieldwork begins, what is learned in the field feeds back into and sharpens both research design *and* field research design. To give just a few examples, carefully considering the data they are collecting can suggest to scholars the need to clarify the initial question, consider an alternative hypothesis, include an additional field site or different cases, add a previously neglected data-collection technique, or make contact with members of a previously unknown group of stakeholders in the political process. New concepts can emerge (or a scholar can refine those with which he began his study), and researchers can discover or devise new strategies for measurement, through their experiences on the ground. Through such constructive iteration, fieldworkers respond directly to what they are learning and to changes in research conditions in ways that tend to correct misconceptions or ill-conceived design decisions. While these feedback cycles can feel rather jerky and uncomfortable to the researcher him- or herself, they allow field research projects to be well designed, grounded in relevant data, and primed to produce strong theory about politics.

There are at least two things our conceptualization of field research as iterative does *not* imply. First, it does not imply that fieldwork cannot be (or is not) planned. There are tradeoffs associated with most changes scholars make to their projects based on discoveries in the field, and their costs and inferential implications need to be carefully considered. Scholars can only think critically about these changes if they have carefully designed their field

⁹ Interview, DK-17, August 24, 2012; see also LM-4, August 27, 2012.

¹⁰ Interview DK-18, August 24, 2012; see also LM-17, September 11, 2012.

research to begin with: only if the project *has* a plan is the notion of a “change” to the project meaningful, and can its implications be assessed. Second, fieldwork’s eclecticism and its iterative nature do *not* imply a lack of rigor. They do not mean that fieldwork is haphazard and unsystematic. Rather, scholars who carry out field research carefully track their projects’ many moving intellectual parts. For instance, they take careful notes about the data they are collecting and the processes used to collect them, and seek to assess their initial hypotheses systematically while continuing to look for evidence to refute (or support) alternative explanations.

Drawing together these points, we submit that scholars who study parts of the world with which they are not familiar (whether they be near or far) *without* doing fieldwork there – without engaging with those contexts – can misunderstand and misinterpret empirical reality. This can have grave consequences for inference and analysis, leading researchers to (for instance) set up experiments incorrectly, or to ask unintelligible, misleading, or simply irrelevant questions in interviews or surveys. It is simply difficult to use most data-collection techniques effectively without sophisticated knowledge of the context in which they are being deployed. Moreover, scholars who use existing datasets without knowledge of the context in which they were produced may be unable to assess the data-generation process, the validity of the data, or the validity and reliability of the measures used to evaluate the phenomena being studied. Without understanding the context in which data were collected, scholars can have a much harder time building well-specified models and interpreting their findings; indeed, they may completely misidentify or misinterpret them.¹¹

All of the practices discussed in this subsection allow scholars who conduct field research to engage in what we might call “layered learning,” which helps them to avoid these sorts of pitfalls. That is, as scholars collect, consider, and analyze data in the field, they gain new layers of knowledge. And as they think through the fundamentals of their research project in light of that knowledge, their projects are strengthened and enhanced, leading to yet more learning. All of this has positive implications for their intellectual progress and products. Indeed, it is in great part this layered learning that occurs in the field that allows scholarship based on field research to deliver such a powerful intellectual punch.

¹¹ In fact, as one interview respondent put it, if one doesn’t “know the field context . . . you don’t even know what variables to put in your model” (interview, LM-8, August 30, 2012).

Principles of field research in political science

As we posited in the book's introduction and have discussed throughout, six principles underpin and animate effective field research practices in political science: engagement with context, flexible discipline, triangulation, critical reflection, ethical commitment, and transparency. Before advocating for the utility of these principles, we quickly emphasize two framing points made when we first introduced them. First, we did not cut these principles from whole cloth with the intent of imposing them on our unsuspecting colleagues in the discipline. We identified them through an analysis of publications based on field research, the incipient writing on field research in the discipline, and our in-depth interviews with and survey of a diverse group of US-based faculty. We do not (merely) propose that they *should* underlie good field research, we suggest that they already *do*, if often only implicitly. As such, we are describing as much as we are prescribing.

Second, we do not offer these principles as a standard template to be rigidly followed. How they are prioritized, combined, and applied is contingent: it will differ from scholar to scholar, project to project, and context to context. Nonetheless, we do believe that there is sufficient commonality in the fundamentals of fieldwork for the spirit of these principles to be usefully followed by all political scientists who do field research. And we posit that political scientists who conduct fieldwork in a way that closely hews to these *process*-related principles will be better positioned to produce outstanding scholarship based on field research.

Engagement with context

First, we argue that engagement with the field research context is a critical principle of good fieldwork. We start with this principle because it gets at the essence of what field research is and the doors it opens. Field research requires "being there." Personal proximity to the political phenomena, people, or information sources under study matters in large part because it enables – virtually forces – the investigator to see and learn from the surrounding context rather than merely acquiring disconnected fragments of data.

What engaging with a context means and how fieldworkers do so, of course, vary: researchers' strategies will differ, and different projects and field sites will require distinct techniques. Engaging with context can mean looking for opportunities to linger with one's interviewees, perhaps staying for an extended conversation over a dinner that includes the subject's friends or family. It can mean flipping through the books on a library shelf, or record

boxes in an archive, that surround the one originally sought. It can mean realizing that the content of an informant's phone conversation with a colleague, overheard during an interview, contradicts what the informant had just said to the researcher. It can mean learning that local historians have published a compilation of documents that directly address one's research question.¹² It can mean seeing the bewildered look on the face of a survey pre-tester when asked a question one had thought was perfectly clear. As one of our interviewees noted, engagement might mean a thoroughness that leads to knowing one's cases "really, really well."¹³ Becoming engaged might include partaking in discussions and collaborating with local scholars, as well as incorporating local literature and sources.¹⁴ It might involve affiliating with a host institution or forming an important link with an NGO.¹⁵ Or it might entail knowing the language, history, and culture of one's field sites, or being familiar with nuanced variation within cases.¹⁶

In dozens of different ways, our interview respondents conveyed to us that engagement with context and the resulting case knowledge are indispensable for field research to be effective and to provide value. For instance, some scholars suggested that engaging with context augmented their ability to identify "bullshit,"¹⁷ and avoid "superficial" analysis.¹⁸ Another suggested that close engagement allows one to understand things in an *interactive* way, and absorb information in a more critical way, because one is using all one's senses and registering things holistically; fieldwork, he suggested, "shoves questions at you."¹⁹ More specifically, scholars suggested that the long-term relationships developed in the field helped them to "navigate the system" and gain access to people,²⁰ untangle power relations,²¹ and understand the meaning of interview responses.²² One scholar articulated the idea directly:

to be stopped by a well-armed soldier in the middle of nowhere is an experience you have to go through to understand things . . . fieldwork remains a huge reality check on the basic dynamics of society, of economy, on how people interact; a lot of those really basic insights you can only get by going to the country.²³

¹² Interview, BR-4, August 9, 2012.

¹³ Interview, LM-8, August 30, 2012. Also interviews, LM-4, August 27, 2012; LM-9, August 30, 2012; DK-6, July 31, 2012.

¹⁴ Interview, LM-5, August 27, 2012. Also interviews, LM-4, August 27, 2012; LM-8, August 30, 2012.

¹⁵ Interview, LM-16, September 11, 2012. ¹⁶ Interview, LM-9, August 30, 2012.

¹⁷ Interviews, LM-2, April 14, 2012; DK-17, August 24, 2012. ¹⁸ Interview, LM-8, August 30, 2012.

¹⁹ Interview, DK-7, August 1, 2012; DK-4, July 30, 2012, said something similar.

²⁰ Interview, DK-17, August 24, 2012. ²¹ Interview, LM-8, August 30, 2012.

²² Interview, DK-18, August 24, 2012. ²³ Interview, LM-22, October 2, 2012.

We hasten to clarify three points. First, while they may often be closely connected, engagement with a particular context is not necessarily directly proportional to the amount of time spent there. How much time a scholar needs to spend in a context in order to engage with it can vary considerably. The most important source of that variation may be *knowledge of context*,²⁴ which can be garnered in several ways. As our respondents emphasized, carefully preparing – developing appropriate language skills and relevant knowledge of the history, culture, economics, and politics of one's field sites (Perecman and Curran 2006), perhaps by taking area studies courses, watching local television broadcasts, reading local newspapers, meeting expatriates – and employing other strategies for becoming familiar with a place can set scholars up to engage more quickly and effectively upon arrival. This can help offset the time restraints sometimes imposed by funding limitations, or a scholar's life circumstances. As well, scholars who have visited a location many times have built up a reservoir of knowledge about the place and how to accomplish research there that may dramatically reduce the amount of time they need on any one trip.²⁵ In sum, engagement with a particular place has more to do with a scholar's connection to it and how she uses her time there than the absolute quantity of time spent on any one visit.

Second, we are not suggesting that all researchers must actively engage with their field sites throughout their time there. How much engagement is necessary and optimal depends (again) on a scholar's familiarity with the context and the analytic goals of the particular field stay. For those who *already understand* a context prior to a certain field research foray, intense engagement with it may be less crucial. Likewise, if one seeks simply to give an exploratory test to a particular idea or carry out a delimited shadow case study, extensive engagement with a context may be less critical for analytic success.

Finally, we would be remiss to neglect what are sometimes perceived as potential downsides of deep engagement in the field. At least some of our interview respondents cautioned that all-consuming immersion in a field site can bring a risk of losing objectivity.²⁶ Yet others suggested that the benefits of fieldwork outweighed that potential cost. As one scholar noted, "I think

²⁴ Interviews, LM-5, August 27, 2012; LM-6, August 30, 2012; LM-9, August 30, 2012.

²⁵ One interview respondent made this point quite directly, suggesting that, while a returned Peace Corps volunteer might be able to do very successful field research in a summer, it might take a 23-year-old who had never been out of his home country a year to conduct effective fieldwork (interview, LM-22, October 2, 2012).

²⁶ E.g., interview, DK-17, August 24, 2012.

the objection that you lose your objectivity actually underestimates the human capacity for creativity [and] the ability of the researcher to be very conscious of what he or she is doing . . . Getting friendly and getting very comfortable with people allows you to dig deeper into their subjectivities.”²⁷ Field research, we would concur, enables just this type of creativity.

Flexible discipline

Field researchers, who are often under resource constraints of various types, need to ensure that each step they take and decision they make advances their overall analytic objectives. Yet they should not be so focused that they miss opportunities for soaking and poking, or for productive serendipity, and not *so* rigid that they refuse to amend aspects of their project that their evolving understanding has shown to be untenable. We capture this tradeoff in the notion of “flexible discipline.” Acting according to this principle means working to stay on task – by keeping the overarching goals of one’s project in mind, planning, organizing, anticipating research challenges, and carefully logging one’s progress – while at the same time giving oneself the latitude to accommodate and adapt to unforeseen challenges and opportunities. To give an example, we suggested in Chapter 3 that scholars create (even before they enter the field), and operate based on, a detailed and well-organized data-collection plan – yet we emphasized that this plan does not lock them into a fixed list of chores. Rather, it helps them move back and forth between their project’s key abstract concepts and the range of possible sources of evidence on the ground. It serves as a guideline to help them to identify which field activities to prioritize but also demands ongoing creativity as it is continually updated and revised.

Two interviewees expressed the “flexible” part of this principle quite clearly: sometimes, said one, you need to “get a little ‘lost’ and allow yourself to “stumble across things” in the field.²⁸ Another admonished, “And for God’s sake, don’t . . . think that you have a precise task and can just do that.”²⁹ Without putting a name to it, scholars gave us countless examples of how this principle underlay their research process, and the ways their research was enhanced by it. One scholar explained that her pre-field preparation had been essential, but that she nonetheless had to adapt and carefully refine her study in an iterative fashion as she gathered new information. She offered a telling example of how initial interviews prompted a substantial reframing of

²⁷ Interview, LM-11, August 31, 2012. ²⁸ Interview, LM-4, August 27, 2012.

²⁹ Interview, LM-10, September 18, 2012.

the research question, from when and why a particular foreign policy decision had been made to how policies emerge without any precise decision being made at an identifiable point in time.³⁰ Another scholar who had planned to engage in formal interviewing of presidential candidates in Latin America retooled to carry out participant observation instead as he was invited on campaign trips; the same scholar found himself suddenly needing to develop strategies to collect videos he did not anticipate being able to secure (and then find ways to deal with old Betamax tapes).³¹ When the government of the country in which another researcher was conducting fieldwork expelled refugees from a neighboring country, the new political reality led her project to become more policy-focused, and meant reallocating the amount of time spent in different field locations.³²

Of course, emphases will differ by scholar and by project: while some researchers feel more comfortable prioritizing flexibility, others emphasize discipline. To offer just one example tilted toward the latter, Beckmann and Hall (2013) present a highly positivist, “just the facts” perspective on how they interviewed Washington elites, recounting how they asked their core questions; collected the relevant data; and sought to minimize the degree to which respondents went off on tangents, drove the conversation, or regaled them with stories. Overall, however, given the challenges *and* opportunities that fieldwork contexts often present, we believe most scholars will be best served by finding a balance between being flexible and being disciplined in the execution of their research.

Triangulation

We use the term “triangulation” to refer to gathering data from multiple sources in an effort, for instance, to measure a certain concept or assess a particular hypothesis. More loosely, we also refer to collecting different perspectives and views – whether that is accomplished through consulting a “number of different archival sources”³³ or being sure to “talk to people on different sides of an issue”³⁴ – as triangulation. The core objective is to collect information that clearly and fully reflects the empirical reality under study, and that allows the scholar to cross check data and sources.³⁵ Triangulation can be

³⁰ Interview, LM-15, September 10, 2012.

³¹ Interview, DK-3, July 27, 2012.

³² Interview, LM-16, September 11, 2012.

³³ Interview, LM-4, August 27, 2012.

³⁴ Interview, LM-6, August 30, 2012.

³⁵ Interviews, LM-12, September 6, 2012; LM-18, September 14, 2012.

important in research of all kinds, but the opportunities for triangulation that field research offers are an essential aspect of its power as a form of inquiry.

Some scholars triangulate while using a single data-collection technique. For instance, they may independently interview a variety of subjects about a single political event, or compare the accounts of multiple informants at a given site in which they are engaging in participant observation. Others triangulate with data gathered using more than one technique. Field experiments offer a way of testing a causal relationship for which other techniques have uncovered evidence, for example. Indeed, the fact that political scientists tend to employ multiple data-collection techniques in a single project suggests that field researchers habitually triangulate. Still other scholars may use different techniques to address different aspects of a project rather than to triangulate on one, strictly speaking. Furthermore, some investigators explicitly build triangulation into their research design, while for others it is a matter of noticing things that reinforce or challenge other observations. One way or the other, triangulating offers countless opportunities to find information that contradicts or supports one's initial hypotheses, thus facilitating the development of well-reasoned and persuasive political accounts.

In myriad ways, scholars we interviewed emphasized that there is no better antidote to doubts about data, and no better way to increase our confidence about their evidentiary value, than triangulation. For instance, going to campaign rallies helped one scholar who studied presidential candidates to see how much trust he could put in the rendition of campaign messages mentioned in other data sources, and how much of a candidate's message he was measuring by just analyzing television advertisements; likewise, watching the television ads informed his interviews.³⁶ Two scholars noted how on-the-ground knowledge gained through observation and participant observation helped them to interpret statistics and data gained through other collection techniques.³⁷ Another who had done archival work in Europe noted the repeated interplay between the questions she asked and what she learned from oral interviews and information extracted from documents garnered in the archives.³⁸

While triangulation is often elective, sometimes it is a necessity, if little or only incomplete data can be obtained using any one technique. For instance, lamenting that "President [X] was not a guy who wrote stuff down," one scholar described how it was necessary to research far beyond the president's

³⁶ Interview, DK-3, July 27, 2012. ³⁷ Interviews, DK-18, August 24, 2012; DK-19, August 27, 2012.

³⁸ Interview, LM-7, September 20, 2012.

personal papers and diaries in order to answer questions about what drove military intervention.³⁹ No matter what their motives for triangulation, scholars need to be selective about how they carry it out. Even when multiple sources suggest the same thing, researchers must be cautious about drawing conclusions, as the subjective perspectives of interested parties cannot be taken as the gospel truth. Further, researchers can become stretched too thin in their quest to find multiple types of data to measure each important concept, support each hypothesis, and help to determine how each causal mechanism works. Knowing when to stop can be difficult. Nonetheless, our respondents seemed to agree that thoughtful, considered triangulation benefitted their work and augmented their confidence in their conclusions.

Critical reflection

By critical reflection, we mean actively thinking about the choices faced at every point of the research process,⁴⁰ the practices employed, the data collected, and what is being learned in the field. One scholar described what she terms “self-reflexivity” as “constantly thinking about what did I do wrong, and how could I have done it better.”⁴¹ Most of our interviewees agreed that thinking critically is an omnipresent aspect of field research,⁴² and emphasized the importance of continually allowing ideas and conclusions based on initial analysis carried out in the field to filter back into and inform the many decisions field research entails. Indeed, this principle lies at the heart of the iterative nature of field research, and is central to the assessment processes discussed in the last chapter, which facilitate the detection of problems in one’s project early on.

One scholar explained that, from the first interviews she carried out, she continually considered how she could encourage her respondents to talk about, and feel as comfortable as they could reliving, the traumatic events that were the subject of the interviews. She came up with the idea of creating settings in which her respondents felt like they were controlling the interview.⁴³ Relatedly, a number of scholars mentioned reflecting critically on how they presented themselves, and on how they were perceived, by those

³⁹ Interview, LM-19, September 18, 2012.

⁴⁰ Interview, LM-14, September 7, 2012.

⁴¹ Interview, LM-13, September 7, 2012.

⁴² Indeed, one scholar went as far as suggesting that scholars should consciously *set aside time* to think while in the field – planning the time in as part of their research schedule (interview, DK-14, August 10, 2012).

⁴³ Interview, DK-19, August 2, 2012; many other scholars mentioned critical reflection in connection with gaining access, e.g., DK-11, August 7, 2012; DK-12, August 8, 2012; DK-17, August 24, 2012; and LM-7, September 20, 2012.

with whom they interacted.⁴⁴ One researcher noted how she had quickly realized that her respondents were drawing conclusions about what she “represented,” motivating them to react to her in a particular way and convey only certain information.⁴⁵

Other scholars highlighted their continual self-questioning about whether their research question was genuinely interesting, or ripe for investigation.⁴⁶ For example, one wondered whether her project was a construction of what Westerners think is important in the countries she studied, rather than reflecting what local citizens perceived as being important.⁴⁷ Through speaking at length with the subjects of a field experiment, another researcher learned that they were more concerned with problems like hunger than they were with the topics under investigation, and gave thought to the implications of this for the research project.⁴⁸ Still others reflected on the *content* of interviews. One realized that her respondents were answering questions in the context of the moment and contemporary political events and hence sought a strategy to create some distance between her conversation and the immediate political context.⁴⁹

All these examples illustrate the importance of reflecting on what one is doing in the field while doing it. Outstanding researchers engage in this sort of mental processing in parallel with their daily work, allowing them to identify problems before they grow unmanageable, and capitalize on opportunities to improve their projects. While it may seem self-evident that fieldworkers should engage in such self-scrutiny, they can easily fall into unreflective routines as they “fight fires,” addressing the seemingly endless logistical and practical challenges that gathering data entails. This can result in important leads – potentially significant hypotheses – going unpursued, and data being irretrievably biased. Effective field research requires critical reflection and the cognitive habits it implies – an ongoing drumbeat of questions such as: Why am I doing what I am doing? What am I doing right? What am I doing wrong? And what could I or should I be doing differently?

⁴⁴ Beyond the examples in this paragraph, other interviewees said similar things, such as DK-12, August 8, 2012; DK-18, August 24, 2012; LM-5, August 27, 2012; LM-6, August 28, 2012; and LM-11, August 31, 2012.

⁴⁵ Interviews DK-10, August 6, 2012; LM-15, September 10, 2012; and LM-10, September 18, 2012, also highlighted that both interviewers and interviewees have biases that affect their interaction and the data it produces.

⁴⁶ E.g., interview, DK-19, August 27, 2012. ⁴⁷ Interview, LM-5, August 27, 2012.

⁴⁸ Interview, BR-2, July 30, 2012. ⁴⁹ Interview, DK-11, August 7, 2012.

Ethical commitment

Ethical commitment to the individuals whom researchers have involved in their projects, and to people in their field sites more broadly, is another key principle of good fieldwork. Of course, scholars think about ethics differently and make distinct choices, depending on their analytic proclivities, the nature and sensitivity of their topic, and the context in which they are working. As we have suggested previously, we might think of a spectrum of ethical commitment with a minimalist “do no harm” conception of ethics,⁵⁰ or the goal of reducing to a minimum risks to study participants (and field-site inhabitants more generally) at one end,⁵¹ and a more ambitious notion of beneficence,⁵² or a self-imposed obligation for one’s research to have some positive impact, at the other.⁵³ Certainly, considering the discipline as a whole, there are scholars at all points along this spectrum. Nonetheless, our research revealed that, for most, acting ethically in the field means something more than submitting their projects to relevant IRBs and following their rules and guidelines.⁵⁴ Moreover, this principle is tightly intertwined with the other five. For instance, as one scholar mentioned, deep knowledge of context allows one to be more ethical over time as one develops sensitivities and better understands nuances.⁵⁵

Regarding specific ethical issues our respondents discussed, some worried about “extracting” information from people without giving back. To reciprocate, one trained a respondent on email and basic computing techniques,⁵⁶ and another chose as RAs a group of students who would truly benefit from and appreciate the opportunity, and would be able to use the training to obtain access to greater professional opportunities.⁵⁷ Another respondent expressed concern about issues that can arise after researchers leave the field, should information they collected become critical or sensitive in the future.⁵⁸ Others worried about how much scholars should disguise their research in order to facilitate interaction with others. Still others considered whether it is

⁵⁰ E.g., interview, DK-17, August 24, 2012.

⁵¹ Interview, LM-15, September 10, 2012. In fact, the spectrum even extends beyond a minimalist perspective. We were frankly surprised by the number of scholars who reported that they did not even go through their home institution’s IRB process. For example, interviews, DK-5, July 23, 2012; LM-18, September 14, 2012.

⁵² Interview, DK-19, August 27, 2012.

⁵³ Interviews, LM-13, September 7, 2012; LM-16, September 11, 2012.

⁵⁴ See also Scheyvens and Storey (2003, 233–237). ⁵⁵ Interview, LM-7, September 20, 2012.

⁵⁶ Interview, DK-1, July 20, 2012.

⁵⁷ Interview, LM-1, April 13, 2012; LM-13, September 7, 2012, mentioned something similar.

⁵⁸ Interview, DK-12, August 8, 2012.

possible to “compensate” for costs imposed on subjects or “resolve” ethical dilemmas, and pondered the wisdom and utility of sending copies of one’s work back to the field site.⁵⁹ And still others wondered whether, by conducting their work in an ethically sound fashion, they could avoid creating problems for future researchers.

On this issue, then, our respondents seemed to have more questions than answers, although their careful consideration of the questions reveals sensitivity to the issues at hand. It is also the case that, given the number of lives that one typically touches while in the field – for a moment, or for an extended period – one could clearly become paralyzed worrying about ethical issues. Moreover, as one scholar cautioned, while IRBs typically assume that researchers are all-powerful and respondents all-vulnerable, this is hardly the case in all circumstances.⁶⁰ We can offer no precise answers to the many troubling ethical dilemmas that field researchers inevitably face in their field sites. Rather, we simply underline the notion that thoughtful consideration of one’s position on the ethical spectrum just mentioned, and self-conscious and active commitment to that position, are elements of all good field research.

Transparency

Engaging in research in a transparent fashion entails keeping track of, documenting, and justifying how one collected and analyzed data in the field, and the choices one made while doing so. Closely related to critical reflection and ethical commitment, being transparent in these ways helps scholars to operate more systematically and produce more persuasive studies,⁶¹ and makes it easier for others to learn from – and to evaluate and replicate – their work.

As noted previously, we are introducing this principle on a more prescriptive than descriptive basis. Most scholars’ fieldwork practices remain largely opaque, and even our interview respondents rarely discussed the ways in which their work was transparent. This situation hinders analytic progress. Colleagues who have packed suitcases and headed out into the intellectual unknown have accumulated an immense amount of collective knowledge – experience produces practical wisdom – and it is in our interest to learn from one another. Yet capitalizing on this stock of *savoir-faire* is not easy. Books

⁵⁹ Interview, LM-22, October 2, 2012.

⁶⁰ Interview, LM-17, September 11, 2012.

⁶¹ Interview, DK-15, August 21, 2012.

and articles that draw on fieldwork rarely contain summaries of their authors' fieldwork practices that are sufficiently thorough to serve as guidance or inspiration. Authors rarely delve into the details and problems of data collection, let alone discuss how they analyzed and interpreted their data, or how they iteratively updated their original research designs.

Of course, there are important exceptions, as noted in previous chapters. Some scholars do give extended discussions of their field research practices in their written products (e.g., Fenno 1978; Scott 1985; Wedeen 1999; Wood 2003). And others offer separate accounts or reflections on what they did in the field (e.g., Tessler and Jamal 2006; Wood 2006; Paluck 2009). Yet because this wisdom is scattered in many different places and not (generally) studied, it is more difficult to access and digest.

Despite current practice, many of our interviewees acknowledged the importance of – or even argued persuasively for – transparent research practices when we brought it up. As one scholar explained, “The burden is on the person who does fieldwork to show how it was done; what is credible about that approach.”⁶² Another scholar invoked “science” when she explained the special burden of transparency that qualitative field researchers carry: “The thing we always hear about science is that we should be transparent. That’s really important for fieldwork too to be transparent about what we do. Especially when you are soaking and poking and doing qualitative interviews.”⁶³ Even when publication space is restricted, transparency contributes to an improved understanding of – and evaluation of – the data and insights derived from the field.⁶⁴

Transparency has reasonable limits. It need not mean spending as much time documenting one’s research as doing it. Carefully documenting one’s research practices takes time, after all – time that some might feel would be better spent collecting more data or analyzing it. Further, to the degree that one’s *data* are confidential, for example, one’s data-collection practices may need to be kept confidential as well. Nonetheless, given the payoff – in terms of our ability to evaluate qualitative research effectively, and our ability to learn from it – we believe transparency can and should be a goal for scholars who collect their own data through fieldwork.

⁶² Interview, LM-17, September 11, 2012.

⁶³ Interview, LM-13, September 7, 2012; also, LM-11, August 31, 2012.

⁶⁴ As one scholar summarized, “Transparency is good – we need to know how scholars developed their ideas. And it’s important for future generations to learn about building knowledge.” Interview, DK-11, July 30, 2012. See also Punch (1986, 15).

The six principles: application and implications

These six principles animate field research from the time a project is being conceived through the time it is being written up, and the best research rests on a careful consideration of each one. This does not necessarily mean, however, that each principle is equally salient at every moment. Indeed, they may sometimes be in tension or outright conflict with one another. A strong commitment to confidentiality, for instance, could complicate offering a detailed account of data-collection practices (Brooks 2013, 87). Likewise, engagement with the field context and flexible discipline might clash momentarily – as a scholar yearns to find out more about a tantalizing phenomenon related but not central to the project he is pursuing in the field. At such moments, scholars will need to evaluate whether to prioritize engagement or discipline.

These potential conflicts notwithstanding, we believe that the six principles of fieldwork most often reinforce one another, producing a stable and identifiable foundation for excellent field research. We offer just a few examples of the synergies among them, some of which were intimated previously. Engagement with context and critical reflection, for instance, help scholars put into practice their commitment to ethics. Unless a scholar develops a nuanced understanding of the context in which she is working – and is *thinking* about what she is learning – it will be difficult for her to discern what constitutes “ethical behavior” in that context. Engagement with context also facilitates triangulation, helping scholars to identify the various voices and perspectives that must be brought into their inquiry. Likewise, critical reflection facilitates flexible discipline and transparency: scholars need to be thinking critically about what they are doing in order to identify moments when flexibility should override discipline, and to be able to clearly articulate the processes through which they generated and analyzed data, and how those processes affected their evidence, inferences, and conclusions.

What are the implications of articulating and following these six principles of good field research? We suggest four. First, we believe scholars who follow these principles simply do better fieldwork. Discussing and developing them can help improve the teaching of fieldwork practices and give new practitioners general guidelines to follow as they build experience. Second, we believe articulating these principles – bringing to the fore the tacit consensus that has begun to form around them – helps to illustrate how difficult and time-consuming it can be to carry out field research. We do not wish to enter into debate about whether field research is more or less difficult than other

forms of inquiry. Rather, we simply highlight that these principles demonstrate the time- and resource-intensity of field research – realities that we think deserve institutional recognition, as discussed below.

Third, we believe – and hope – that articulating these principles facilitates the disciplinary evaluation of field research, offering a basis for assessment not specific to any mode or type of fieldwork or any data-collection technique. Finally, we hold that these principles could serve as a basis for developing a common language for talking about field research. Developing and using a set of clear terms to discuss fieldwork practices – a vocabulary that captures and reflects these mutually agreed-upon principles – will help scholars to describe their field research and illustrate its effectiveness more easily, helping both proponents and skeptics see its value more clearly.

To close this section, we briefly highlight how the three arguments the book advances overlap and intersect. First, each of the three arguments explicates aspects of how field researchers in political science constitute a coherent if diverse community, with widely shared strategies, practices, and norms, and how this community contributes in extraordinary ways to the generation of new knowledge in political science. Second, it is because of the commonalities that underlie field research in the discipline that there *can be* a set of principles for good fieldwork. And finally, due to the value that field research adds, it is worth articulating these principles rather than leaving them implicit. We expand on these points further in the chapter's conclusion.

The future of field research

Having examined the history of field research in political science and explored scholars' experiences and practices of recent decades and the present day, we now shift our thinking toward the future, discussing how a series of dynamics will shape the need for and nature of field research in the years to come. The first two issues that we discuss – changing ethical norms and evolving disciplinary standards for transparency – link tightly to the last two principles of field research just mentioned, underscoring the centrality of some of the most critical debates in political science today for the future of field research. Subsequently, we consider the effect that changes in world politics, technology, and the availability of funding will have on fieldwork in the discipline.

Evolving ethical norms

Recent contestation and changes in the norms governing the ethical conduct of research are sure to affect field research in the future. Over the past several years, political scientists have joined other scholars in the social sciences to voice complaints about the increasing stringency of campus-level IRBs in the United States (Yanow and Schwartz-Shea 2008). One commonly espoused viewpoint was that since the requirements to protect human subjects had originated in an effort to regulate biomedical research, they were frequently inappropriate when applied to the social sciences. Some scholars also worried that the increasing decentralization of IRB enforcement meant that the local application of federal rules was inconsistent, leaving more room for good intentions to lead to bad outcomes.

In response to some of these concerns from social scientists, as well as others from the natural and health sciences, in late July 2011 the federal government proposed a sweeping reform of the set of human subject rules known as "The Common Rule."⁶⁵ Many of these reforms aimed to expand the federal government's power to regulate human subject research, and extend protections to more people.⁶⁶ For example, institutions receiving *any* federal funding would be required to apply the federal rules to *all* projects, even those that were not funded by the federal government.⁶⁷ With regard to the social sciences in particular, research involving surveys and interviews posing minimal risk to respondents would be exempted from IRB review; the reforms also sought to encourage clarification and standardization of consent forms. Government officials rationalized these and other changes as working to modernize the existing system and clarify federal expectations in order to streamline the entire IRB process.

The spirit of these federal guidelines – the protection of people whom scholars involve in their research – remains the same. However, the revised rules, if approved as originally conceived, could have both positive and negative *practical* effects for political science field research. On the one hand, more types of research would likely be considered "exempt" from full IRB review, simplifying and expediting the approval process for many scholars

⁶⁵ The Common Rule outlines *one* series of criteria for ethical supervision, informed consent, and the protection of human subjects at fifteen federal entities. See David Brown, "U.S. proposes rule changes for human subjects research." *Washington Post*, July 23, 2011. To our knowledge, as of March 2014, the rule changes proposed in 2011 had still not been implemented.

⁶⁶ See "Regulatory changes to ANPRM" at www.hhs.gov/ohrp/humansubjects/anprmchangetable.html.

⁶⁷ Many universities had already implemented this policy in the prior era of growing stringency in order to ensure proper and consistent compliance for all projects.

using survey and interview research. On the other hand, the increase in standardization of informed consent forms could make it more difficult for researchers to customize their forms for politically sensitive or foreign cultural contexts. This, in turn, could potentially compromise their ability to help their human subjects understand the risks they might face and benefits they might enjoy as a result of participating in research projects. This outcome would of course be at odds with the overall goals of protecting human subjects and ensuring *informed* consent.⁶⁸

While federal human subject rules are being rewritten from the top-down, other ethical norms are changing from the bottom-up. Academics appear to be discussing and writing about these issues more frequently (Schrag 2010; Brooks 2013). In recent literature on field research, for example, scholars highlight the need for constant vigilance about ethical challenges and reflect critically on how best to respond before, during, and after data collection in the field (Punch 1986, 13; Scheyvens and Storey 2003, 233–37; Osaghae and Robinson 2005; Wood 2007).⁶⁹ As noted in Chapter 9, field experiments raise new kinds of ethical considerations on which the discipline should thoughtfully reflect. In addition, there is growing concern on the part of some scholars that academic research should somehow benefit the people whom scholars involve in their studies, reflecting a shift from the historical focus on protection from harm to a new emphasis on beneficence.⁷⁰ For many scholars, this objective has translated concretely into sharing research results with field-site communities and study participants, particularly prior to publication in academic outlets.⁷¹ Furthermore, in certain cases, “human subjects” themselves are initiating discussions and proposing new sets of rules and practices (Mihe-suah 1993; American Indian Law Center 1999; Caldwell and Davis 2005).

New technologies have both helped and hindered scholars’ efforts to fulfill their ethical obligations. For instance, the computers on which researchers

⁶⁸ In late August 2011, the APSA encouraged its members to voice their reactions individually and also solicited comments for discussion and resolution by the APSA Council at the national conference in Seattle in September 2011. APSA also contributed a response as a member of the Consortium of Social Science Associations (COSSA). The Social and Behavioral Science White Paper from COSSA responding to the proposed rule changes is available at: www.cossa.org/advocacy/2011/SBS-White-Paper-ANPRM-10-26-11.pdf.

⁶⁹ In addition, several books on field research either have “ethical challenges” in the title or have separate chapters dedicated to ethical dilemmas, e.g., Wilson (2005), Mertus (2009), Paluck (2009), and Thomson, Ansoms, and Murison (2012).

⁷⁰ The *idea* itself is not new; beneficence is one of the three core principles outlined in the Belmont Report in 1979. The other two are respect and justice.

⁷¹ Schnabel (2005, 31) goes further to argue that study participants “should be considered the true owners of the data, which is held in trust (but not owned) by the researcher.”

now routinely store enormous quantities of data in electronic form can be password-protected; further, electronic files can be encrypted and data can be uploaded and stored securely on a remote server or in “the cloud” (Romano 2006). Radsch (2009) highlights how important it was for her respondents in Egypt and Lebanon to be aware of her extensive efforts to maintain the security of their data. Nevertheless, electronic data can be challenging to organize and protect from accidental loss; moreover, they may be open to theft or hacking by a much broader range of people than materials researchers store away in their closets in locked suitcases. New technologies have also made it much easier for scholars to share preliminary descriptions of research activities and research results with their field-site communities via personal blogs and organizational web sites. Of course, researchers who do so must be as vigilant about anonymizing the data and text as they are when publishing an article or book in order to protect project participants effectively (Sriram *et al.* 2009).⁷²

In sum, the continuing evolution of top-down mandates concerning human subjects rules, the emergence of bottom-up initiatives, and the lack of clarity about how they will interact suggest a changing landscape with regard to the protection of human subjects. Given that ethical commitment is a key principle of good field research, scholars should closely monitor these debates and discussions, and continue to think critically about how best to protect the people they involve in their research.

Changing disciplinary standards about transparency

Over the past several years, political scientists have organized initiatives and developed proposals to facilitate data sharing, and to encourage greater transparency with regard to data collection, analysis, and interpretation.⁷³ These initiatives have begun to generate a discipline-wide conversation about the merits of providing access to the qualitative and quantitative data that support empirical claims in published work. As part of the discussion, the question has also been raised of whether, and how, scholars must explain the processes through which those data were collected and through which analytic conclusions were drawn from them.

⁷² Sriram makes a similar point about the necessity to anonymize preliminary drafts that are circulated via email. Students and faculty often share early drafts that may still contain identifying information with other colleagues, who may then unwittingly forward them or even post them online.

⁷³ These advances are based on many years of discussion; see, e.g., the symposium on verification and replication in *PS: Political Science and Politics* in September 1995.

For instance, in 2010, an APSA Working Group on Data Access and Research Transparency (DA-RT) was formed and tasked with reformulating APSA's policies on the sharing of data and transparency in research practices. By October 2012, the DA-RT Working Group's recommendations had been adopted as APSA policy and approved for inclusion in the association's authoritative statement of ethical principles (the *APSA Guide to Professional Ethics, Rights and Freedoms*). In addition, two sub-committees had formed to develop clear, consensual, tradition-specific guidelines for implementing DA-RT principles.⁷⁴ APSA will likely build on these ongoing initiatives, for example by encouraging the adoption of incentives such as journal, publisher, and funder mandates to promote the sharing of data and greater transparency in research practices.⁷⁵

An associated but separate effort focused on helping scholars who do qualitative work to instantiate DA-RT principles – the creation of an “active citation” standard – has been advanced by Andrew Moravcsik (2010). Active citation entails digitally enhancing citations in publications based on qualitative research by hyperlinking them to a Transparency Appendix (TRAX). The TRAX enriches traditional citation formats with excerpts from the underlying sources, and annotations indicating how those sources support the contentions in the text. The TRAX, in turn, can also be hyperlinked to the actual sources when they can be legally and ethically shared. Some academic journals, particularly in the field of law, are also requiring verification and retention of authors’ original interview transcripts as a prerequisite for publishing research that uses those interviews as evidence (Sriram 2009, 61–64).

A related initiative is the launching of the Qualitative Data Repository (QDR) at Syracuse University.⁷⁶ Complementing existing institutional venues for storing and sharing data (e.g., ICPSR and Dataverse), QDR represents an important part of the infrastructure underlying the data-sharing initiatives mentioned above. Specifically, it offers scholars who gather data as part of qualitative and multi-method research a venue in which to

⁷⁴ Drafts of these guidelines were published as an appendix to the introduction to a symposium on data access and research transparency in the January 2014 issue of *PS: Political Science & Politics* (Lupia and Elman 2014).

⁷⁵ APSA’s move in this direction is consistent with, and may have been encouraged by, the National Science Foundation’s (NSF) earlier step to require that scholars whose research they fund share the data they collected or generated in the course of their work (see the NSF’s *Proposal and award policies and procedures guide, part ii: award and administration guide*).

⁷⁶ See Elman, Kapiszewski, and Vinuela (2010). QDR, available at <https://qdr.syr.edu>, is funded by the National Science Foundation.

store and share them. Scholars can establish different levels of access to their data, helping to address potential human subjects and copyright concerns.

As we alluded to in our previous discussion of transparency, the arguments for sharing data are that doing so facilitates replication, permits secondary data analysis and spurs new research, and fosters greater collaboration among political scientists. Supporters have also emphasized how increased visibility into scholars' data, data-collection practices, and data-analysis techniques can facilitate the evaluation of all political science research, and serve important pedagogical purposes, allowing students to practice analytic techniques on downloaded data, and learn from scholars' discussions of how they carried out their research. In short, supporters believe these initiatives will improve the quality of political science research.

Critics hold that strengthening disciplinary norms for data sharing would carry unacceptable risks of identification for interview participants, highlighting that some subjects will simply be unable or unwilling to have their identity revealed and/or information they provide made available to other scholars. Others have noted the thorny intellectual property issues entailed by greater transparency.⁷⁷ Some interpretive scholars have also raised concerns about the epistemological basis of the sharing initiatives, especially the motivating view that replicability is desirable and achievable. Given their belief that knowledge is socially constructed, they question the premise that "raw data" exist, and consider it unlikely that any two scholars could interpret or understand data in exactly the same way.

Regardless of researchers' individual positions on these issues, norms are being debated and are likely to change to encourage a greater degree of transparency. Those changes will have a range of implications for political scientists who conduct field research. IRB protocols will need to be carefully (re)crafted, and scholars will have to develop ways to ensure that the individuals with whom they interact understand the implications of sharing their information with a very large audience, and are willing to provide their consent for researchers to do so. This type of *informed* consent could be difficult to secure from populations with less exposure to technology. Indeed, in some instances, protecting human subjects will imply sharing data only in partial form, or only after a resource-intensive process of contextualization.

With regard to another potentially worrying implication, the disciplinary encouragement of data sharing could place increasing value on collecting

⁷⁷ To date, these criticisms have been voiced informally in roundtable discussions but have not yet been published.

“shareable” data, which might influence what research questions scholars ask, and where and how they go about gathering the data to answer them. This could place field researchers under cross-pressure – intellectual pressure to ask innovative questions about evolving dynamics in newly open or contentious areas, for instance, and disciplinary pressures to ask safer questions about less-conflictual dynamics in more stable contexts. Finally, the time and expense involved in preparing data for sharing may be more difficult for most graduate students and some junior faculty to accommodate than for senior faculty. Changes in these norms, then, have the potential to augment existing disciplinary inequalities. More optimistically, evolving norms of data sharing will encourage those collecting piles of data during field research to treat those data even more carefully and to organize them systematically from the very beginning so that sharing down the line will be smoother and easier.

While these changes are important and impending, field researchers need not worry excessively. These initiatives are being constructed and advanced carefully and gradually in ways that involve open and inclusive intra-disciplinary (and, indeed, inter-disciplinary) dialogue. To give just two examples, all of the proposed changes to APSA’s *Ethics Guide* were circulated to the Association’s membership and posted on the APSA web site, and public debate and comment solicited. In addition, two roundtables addressing transparency issues were held at the APSA annual meeting in 2013, and another was held at the 2014 conference. Political scientists who engage in field research should remain attentive to – and indeed contribute to – these conversations, as evolving norms of transparency have the potential to impinge in multiple ways on how they conduct research in the field.

Geopolitical change and field research

Major shifts in world politics have shaped scholarly interest in and approaches to field research in political science in fundamental ways, as Chapter 2 discussed. For example, decolonization in Asia and Africa after World War II stimulated scholars to pay more attention to the politics of newly independent nations. The beginning of the Cold War then spurred the development of area studies centers in the United States, which provided extensive financial and institutional support for field research in particular regions. While the geopolitical implications of the major transformations the international political system has undergone during the last few decades have not yet come fully into focus, it seems clear that these dynamics will also have

important implications for the future of field research in the discipline. The fall of the Soviet Union and the transitions to democracy in Eastern Europe obviously helped drive the spike in field research in this region in the 1990s. Similarly, the economic development of East Asia and the rising prominence of China have drawn successive waves of scholars to those areas.

Some of these geopolitical dynamics have complicated field research as well as energized it. For instance, the attacks of September 11, 2001, and the multiple wars and popular uprisings in the Middle East and North Africa in the 2000s have changed the political terrain in this region, both attracting new research attention and making on-the-ground study more difficult. The same could be said of the recent trend toward “democratic rollback” and authoritarian resilience, and of ongoing patterns of widespread civil unrest and violence (Themnér and Wallensteen 2011; Møller and Skaaning 2013). Moreover, in some instances these changes have generated attempts at increased control by funding agencies and university administrators. One scholar we interviewed expressed concern about the chilling effect that legislation passed in the wake of 9/11 (such as the Patriot Act), and evolving attitudes on the part of some universities about where students should study or what faculty travel should be funded with university monies, could have on research and the stream of students into Ph.D. programs.⁷⁸

All of these events and phenomena in world politics have created new arenas for cutting-edge research, influencing the types of questions political scientists pose and where and how they conduct field research to answer them. Political changes and our desire to understand them have brought new urgency to research on issues such as political identity, religion, citizenship and nationalism, state failure and state-building, and inequalities with regard to class, ethnicity, and gender. Topics such as global governance, resource extraction, health, migration, environmental degradation, civil war, and corruption have risen in salience. Moreover, the growing importance of non-state actors – from terrorist groups to multinational corporations to transnational social movements – in many regions of the world have also influenced the form and focus of fieldwork.

Of course, even major world events do not necessarily have an *immediate* effect on field research. American political scientists do not flock to hot spots around the world in the same way that news correspondents or International Crisis Group researchers do. Very few of our survey respondents reported having done research in places like Sudan, Iraq, and Afghanistan. More

⁷⁸ Interview, DK-12, August 8, 2012.

generally, as we noted, only a minority within our discipline has a taste for working in particularly unsettled or even dangerous settings such as conflict zones. Yet, for decades, a persistent subset of political scientists has summoned the nerve to pursue research on pressing but sensitive topics in unstable political environments – areas of authoritarian rule, violence, or post-conflict reconstruction – and this will surely continue to be the case. These colleagues will face challenges of all kinds, including elevated levels of personal danger, and will need to use innovative data-collection techniques to obtain empirical evidence that may be intentionally hidden. They could also face significant temporal cross-pressure: while they may feel compelled to do their work as quickly as possible given unstable dynamics, it may actually take them a comparatively *longer* time to unravel and understand complex and quickly evolving phenomena in contexts that are in flux.

Scholars working in such contexts will also face more acute ethical challenges, requiring them to engage in careful and continuous critical reflection. For instance, gaining entrée and working in areas of conflict often require scholars to collaborate with multiple local partners and other individuals on the ground. Their responsibilities to their subjects are hence multi-layered and complex, often involving organizations, colleagues, and family members, rather than simply individual informants (Sriram *et al.* 2009). In extreme cases, the consequences of identification for some participants in certain scholars' research projects could be truly life-and-death. And scholars may need to anticipate and continually reevaluate the appropriate degree of transparency versus concealment as they carry out research and write up their findings.⁷⁹ In short, working on sensitive topics in conflictual areas raises the stakes of informed consent, anonymity, and confidentiality, and complicates already knotty ethical issues around analysis and write-up.

Whether in an area of high conflict or not, American researchers, and researchers affiliated with American institutions, may need to delicately negotiate their entry into some field sites because of the contentious role the United States plays in global politics and the possibility of anti-American sentiment (Katzenstein and Keohane 2007). In an unsettled world of new geopolitical friends and enemies, researchers may find it particularly tricky to develop and express their own position and stance in the field. Evolving geopolitics, then, will present both opportunities and risks for scholars engaging in field research in the future.

⁷⁹ See discussions by Gallaher (2009, 138) and Pachirat (2009).

Technological advancement and field research

Since the mid-1990s, the world has witnessed an unprecedented expansion of information and communication technologies with far-reaching consequences for field research. Technological change has made much more information publicly available and readily accessible online, expanding access to both old and new data sources. For example, while statements from the leaders of a rebel group might only have been available through in-person interviews in the past, since the early 1990s groups such as the Zapatistas in Mexico have actively provided updates on their mission and recent activities on their web site.⁸⁰

More broadly, technological changes have opened up new virtual spaces for political action, interaction, and inquiry, generating novel questions ripe for study. For example, scholars today are keen to understand the role of social media such as Facebook and Twitter in organizing and publicizing massive social protests in the Middle East (Radsch 2009), and when, how, and why the Chinese government censors social media posts (King *et al.* 2013). Advances in technology have also facilitated the development of new data-collection techniques. For example, new communication technologies permit researchers to conduct in-depth interviews or survey interviews without going to the field, via email, text, telephone, or Skype.⁸¹ Further, scholars now write scripts to “scrape” enormous amounts of information from the web. Such changes further blur the hazy boundaries between field research and other modes of data collection. For example, in the aftermath of the Boston Marathon bombings, one scholar began a project by doing “traditional” oral history interviews and using site-intensive methods in and around the blast sites and then expanded the project using social media to crowd-source oral histories from people who recount how they experienced or learned about the incident wherever they were, near and far.⁸²

Given these changes and other technological advancement that will likely occur, will field research become less and less necessary in the future? Our analysis suggests that, while the technological revolution has influenced and

⁸⁰ See <http://enlacezapatista.ezln.org.mx>. See Russell (2005) for an example of an analysis based on Zapatista web sites and email lists.

⁸¹ In the fall of 2011, Survey Monkey boasted of having over 8 million customers, including 100 percent of the Fortune 100 companies. See www.surveymonkey.com. Competition for online survey work among YouGov, Knowledge Networks, Zoomerang, Qualtrics, and others indicates the growing popularity of these applications in business and academic research.

⁸² See the press release describing the project at www.fitchburgstate.edu/news/professor-launches-oral-history-project-about-marathon-bombing.

will likely continue to influence *how* and *how much* field research is conducted and *where* it is carried out, the practice itself will remain critical for developing deep knowledge about politics around the world. For instance, if archival documents can be downloaded electronically, or if mass public opinion datasets include the precise questions scholars wish to pose, they may be freed up to focus on in-depth interviews or ethnographic observation. Indeed, technological innovation opens up many new avenues for triangulation. Moreover, particularly given political scientists' interest in understanding volatile political dynamics, many scholars will be asking questions in places and situations in which electronic data have not become publicly available. Field research, and the opportunities for engagement and exploration it provides, will continue to be essential for understanding these contexts.

Furthermore, technology is not unbiased. Electronic data may reflect the views, behaviors, and priorities of elites – and may be directed (and thus biased) toward users of computers and mass media. As such, sources and materials available online may not reflect the perspectives of all actors, especially the less elite, wealthy, urban, or literate. Indeed, even in settings where digital information of one kind or another is available in ample quantities, fieldwork is often required to ask new questions and blaze new trails. As one of our interviewees put it, “there are zillions of kinds of data that you can’t get online.”⁸³ Finally, even if every imaginable piece of data were available electronically, and electronic sources could represent all of the perspectives important to a particular study, immersion in the political context where those pieces of evidence were created would still be critical to interpret them effectively. A virtual connection is simply not equivalent to “being there.”

Happily, getting there is easier than ever before. While the technology for travel has not changed as dramatically as have other forms of technology in the recent past, in many contexts the cost and time associated with travel have shrunk. This change, combined with disciplinary pressure to generalize, may place growing demands on field researchers (or may help them fulfill their existing desire) to increase the number of field sites they visit, and/or to consider expanding their comparisons to include more geographically distant field sites.

It also bears noting that technologically advanced approaches and solutions are not by definition superior. Indeed, for many data-collection techniques involving human interaction, any interference between the subject and the

⁸³ Interview, DK-7, August 1, 2012.

researcher – even a simple audio-recording device on the table – might distract, diminish rapport, and degrade data quality. In some instances, the old-fashioned, low-tech approach – note-taking on a tablet of paper – may in fact be better. Still, there can be no question that technological change, in particular the increasing accessibility of the internet, and the growing power and versatility of web-enabled mobile computers (e.g., phones and tablets) will continue to shape fieldwork practices. Researchers will surely come home with fewer *things* (business cards, photocopies of documents, paper questionnaires, hard copies of books and reports) and more digitized information. Anyone who has stayed in touch with far-away research contacts and collaborators via video-chat or social networking platforms surely feels a shrinking of the distance between “field” and “home,” a trend that will continue.

Advances in communications and travel have changed and will also continue to change the human experience of the researcher. Fieldwork is no longer as isolating as it was for many in the past. Even when working in remote, rural areas, scholars are often able to call, email, or video-chat with their family, friends, colleagues, and advisors.⁸⁴ In some cases, technology may allow a scholar’s partner to accompany him or her to the field while continuing to carry out his or her own work duties remotely. Of course, while being able to connect with family more cheaply and frequently can certainly provide needed emotional support, it can also place weighty emotional demands on field researchers who may feel they are required to do “double duty” – both dealing with the multi-faceted challenges entailed by field research *and* resolving the day-to-day problems that arise with their family at home. It may also subtly change the ways in which researchers interact with the field setting, perhaps encouraging them to spend more of their spare time in front of a computer screen and less of it immersing themselves in local tea houses and theaters, thus diminishing peripheral forms of engagement with context. Nonetheless, having more social support in the field will doubtless be welcomed by many.

Technology is not an unalloyed good, of course, and its multiple implications for the conduct of field research need to be carefully considered.⁸⁵

⁸⁴ Even for scholars who work in areas without cell-phone service or electric power, in most contexts communication centers are far easier to reach than they were several decades ago.

⁸⁵ We have mentioned just a small subset of these implications; the subsections on ethics and transparency highlighted others. To offer one additional downstream example, the internet increases the likelihood that some project participants will see what scholars write about them, thus potentially affecting their views of that scholar, and how (and whether) they choose to interact with him in the future.

Nonetheless, the technological revolution will not retreat. Instead, advancing technological change will continue to shift the boundary between information that can only be obtained via fieldwork and information that can be attained through other means, slowly but surely changing the methods, nature, function, and goals of field research.⁸⁶ As those changes proceed, political scientists should think creatively about how technology can facilitate, and indeed enhance, field-based inquiry.

Funding for field research

The sources from which scholars acquire funding to support field research, and the amount of funding they are able to secure, have critical ramifications for the questions they ask and the type of research in which they engage. Our survey and others' research suggest that, overall, the amount of funding available to support field research in political science may have decreased in recent years. As we saw in Chapter 2, nominal funding levels have risen over time, but, in real terms, projects started between 2000 and 2011 generally involved somewhat less money relative to projects of the previous two decades. Of course, projects vary widely in funding amounts, and some continue to be handsomely financed.⁸⁷ Moreover, given that the amount of time scholars spend in field sites has also been declining, average project funding on a per-day basis has been flat.⁸⁸ Thus the funding picture is mixed, but certainly sobering. The discipline can hardly expect a golden age of funding abundance in the near future, meaning that many faculty and graduate students will continue to face financial constraints on their field research. These challenges have their roots on both the demand side (grant applicants) and the supply side (funders).

On the demand side, at least with regard to funding for dissertation research, Agarwala and Teitelbaum observe that graduate students in political science (and sociology) seem to win fewer Fulbright–Hays Doctoral Dissertation Research Abroad (DDRA) fellowships, Social Science Research Council International Dissertation Research Fellowships (IDRF), and National Science

⁸⁶ Scheyvens and Storey (2003, 233–237) conclude that technology will change field research strategies less than we argue here.

⁸⁷ More technically, using the US consumer price index to adjust for inflation, as we did in our calculations in Chapter 2, oversimplifies the complex landscape represented by the actual purchasing power of dollars spent in various times and places around the world.

⁸⁸ Of course, the decreased time in the field may in fact be a *result* of scholars' inability to secure sufficient funding for longer stays.

Foundation awards, relative to competitors in the humanities, history, geography, archaeology, and anthropology. They suggest that, in part, this results from methodological trends. As political science and sociology departments have beefed up requirements for training in quantitative methods, students are left with little time for “contextual work that would include courses in language, history, culture, and area studies” and thus “their applications often fail to provide convincing evidence of their capacity and need to conduct fieldwork” (Agarwala and Teitelbaum 2010, 284). On the supply side, after the boom years of the 1990s, the endowments of US colleges and universities posted modest returns in the ten years from mid-2003 to mid-2013, and were rocked by the global economic downturn after 2008.⁸⁹ Further, many public universities have been hard hit by draconian cuts in state budgets for higher education.⁹⁰ And funding for federal agencies that support research grants – for instance the Fulbright–Hays fellowship program,⁹¹ the National Science Foundation,⁹² Title VI,⁹³ and others – has been dramatically reduced or significantly threatened.

It is vital to contemplate how continued restraints on certain types of funding may affect political science field research in the future. Undoubtedly,

⁸⁹ Reports from the National Association of College and University Business Officers attest to this. See, for instance, “Average annual one-, three, five, and ten-year total returns for U.S. higher education endowments and affiliated foundations for periods ending June 30, 2013,” accessed on February 22, 2014, at www.nacubo.org/Documents/Endowment%20Files/2013NCSEPublicTablesOneThreeFiveandTenYearReturnsRevised.pdf, and “Average and median annual investment rates of return for U.S. college and university endowments and affiliated foundations, fiscal years ending June 30, 2013–2004,” accessed on February 22, 2014, at www.nacubo.org/Documents/Endowment%20Files/2013NCSEPublicTablesAnnualRatesofReturn.pdf.

⁹⁰ Since 2008, at least forty-three states have made cuts in higher education. In many states, the 2011 fiscal year cuts were even deeper than those carried out between 2008 and 2010 (Johnson, Oliff, and Williams 2011).

⁹¹ In late May 2011, the federal government officially announced that the Fulbright–Hays fellowship program for doctoral dissertation research abroad would be cancelled for 2011–2012 – the first complete suspension of the program since 1964. In the 2012 fiscal year the program funded 84 projects in 23 disciplines, far below its previous average of 108 projects annually (5,338 fellowships were awarded from 1964–2012). Figures are from “FY 2012 summary – Fulbright–Hays Doctoral Dissertation Research Abroad Program,” accessed on February 22, 2014, at <http://www2.ed.gov/programs/iegpsddrap/awards.html>.

⁹² In 2013, legislation funding the National Science Foundation barred research on political science unless it promoted the “national security or the economic interests of the United States.” In response, the NSF cancelled its summer 2013 grant cycle. A funding bill signed into law in January 2014 removed the restrictions on political science. See, for instance, “U.S. political scientists relieved that Coburn language is gone,” accessed on February 22, 2014, at <http://news.sciencemag.org/funding/2014/01/u.s.-political-scientists-relieved-coburn-language-gone>.

⁹³ See Anna Grzymala-Busse, “Area-studies centers are vital but vulnerable,” September 30, 2013, accessed on February 22, 2014, at <https://chronicle.com/article/Area-Studies-Centers-Are-Vital/141939>.

those who wish to conduct fieldwork will need to expand the scope of their funding search, looking far beyond the traditional sources while remaining attentive to potential conflicts of interest when conducting fieldwork funded by donors, corporations, or NGOs.⁹⁴ A related option might be to seek out opportunities to collaborate with researchers or institutions in the places they wish to study – a trend that is already evident in projects based around field experiments.⁹⁵ Yet even if these routes are pursued, funding constraints and the tendency toward shorter-duration field research that they may induce will affect the questions political scientists can answer, and thus the questions they ask. For instance, scholars might be less willing to tackle very complex (but substantively important) issues that necessitate longer periods of fieldwork, and may emphasize more policy-relevant questions.⁹⁶ Likewise, funding limitations may make it more difficult for political scientists to work in remote and difficult-to-access places, conflict settings (where field research can take considerably longer to complete)⁹⁷ or contexts known to be particularly expensive. Most broadly, if funding becomes harder to come by, it may simply be that fewer political scientists carry out field research.

Finally, it seems important to consider the ways in which funding constraints may exacerbate inequalities. As we noted earlier, students at higher-ranked institutions are able to secure more funding for international dissertation research than their counterparts at less-elite schools. While this may simply reflect meritocratic processes through which students are selected into graduate programs and proposals are selected for funding, it behooves the discipline to ensure that students from many backgrounds have a shot at obtaining resources for fieldwork. Only a subset of those graduate students and faculty who are unable to acquire private or public funding will be able to self-finance their field research.⁹⁸ While we can do little more than speculate on two other potential trends, it is worthwhile to think about whether funding constraints could result in fewer graduate students conducting field research (as what little money there is will be granted to more advanced scholars who are a better bet for funders), and

⁹⁴ The increased availability of funding from sources such as the Department of Defense would also have critical implications for field research.

⁹⁵ Interview, LM-8, August 30, 2012. ⁹⁶ Interview, LM-9, August 30, 2012.

⁹⁷ Romano (2006, 441) estimates that field research in contexts of conflict takes three to four times longer than elsewhere. Our data provide little evidence that political scientists working in conflict settings spend more time in the field than those working elsewhere, but data collection may be less efficient.

⁹⁸ Another probable effect will be longer doctoral program completion times. Many graduate students will likely attempt a second round of grant applications before making the final decision not to conduct field research.

whether field research will increasingly be carried out by scholars with greater independent financial means.⁹⁹

In sum, important and ongoing changes in several areas – ethical norms, disciplinary standards for transparency, world politics, technology, and funding – will shape field research in political science in significant ways in the future. These trends will create new challenges *and* new opportunities for political scientists who engage in fieldwork. Scholars' willingness and ability to address the former and embrace the latter will lead to continued changes in the role and nature of field research in the discipline.

Conclusion: a clarion call to the discipline

Throughout this final chapter and the book as a whole, we have advanced three arguments, each illuminating how it is that field research in political science makes tremendous contributions to our knowledge about politics, and to theory building in the discipline. First, we have demonstrated the heterogeneity of political science field research and shown its unifying commonalities, arguing that this “bounded eclecticism” helps make field research a formidable technique for generating rich data and analytic insights. Second and relatedly, we have highlighted the ways in which fieldwork advances multiple analytical dimensions of a research project: as scholars collect and consider their data, they engage in layered learning that inspires informed iteration among data collection, data analysis, and key elements of research design. And finally, we have argued that six simple but crucial principles underlie good political science field research. In this concluding section, we draw on those arguments to issue a clarion call to the discipline, challenging political scientists of all epistemological leanings and all subfields to *spread out* and give more attention to under-studied parts of the world, to *collaborate* more in connection with field research, to *think and write* more about field research, to *re-envision graduate methods education*, and to *recognize* the contributions of field research in more tangible ways.

Spreading out

As was noted in Chapter 2, US-based political scientists have concentrated their field research on certain parts of the world and neglected others.

⁹⁹ The data we collected through our survey do not show an increase in self-funded fieldwork.

Locations within the United States have been the focus of much field study, but looking just at international destinations, we see substantial imbalances. Europe, particularly Western Europe, has attracted the lion's share of research visits, though its predominance is declining. In the rest of the world, certain places are studied fairly intensively, such as the capitals and other major cities of Latin America and East Asia, while other locations such as much of Africa, Central Asia, and Southeast Asia are conspicuously under-studied. Political scientists are far more likely to study rich countries than poor countries.

It is not difficult to speculate about the reasons, which we may consider more or less valid, for this bunching-up. Many political scientists seek to study how those in power wield authority and influence, and certain forms of power are geographically concentrated. A researcher pursuing a project on international financial regulation is more likely to do interviews in London than in Yogyakarta. Furthermore, scholars may feel pressure to study larger countries that seem more "significant," and from which findings may be generalizable to other significant locales. We may also tend to study places (and parts of places) where English is more likely to be spoken. And disciplinary currents that flag certain topics and places as trendy and marketable for grant-writing, job-landing, and book-publishing purposes can be difficult to fight.

Still, we pay a price for our relative neglect of certain areas, and there are significant gains to be made by spreading out. Our understanding of key concepts may be biased if they are developed based on special reference to particular cases and not to others. And there is a danger of reproducing within the academy the biases and inequalities that exist in the actual political world. Put more positively, as we have emphasized, field research advances knowledge by bringing existing ideas and concepts into contact with new phenomena and empirical realities. A broader geographical base of field research is certain to help drive innovation. Some relatively little-studied places have clear intrinsic importance, whether we think of Tunisia, Somalia, Iran, Afghanistan, Burma, Vietnam, or Indonesia. Perhaps less intuitively, learning more about poorly understood locales can lead to the development of significant new insights about what is different and significant about the places we thought we already "got," and about how the international system works more generally. Moreover, precisely because we do not know where the next global "hot spot" or crisis zone will be, developing expertise on areas around the world through on-the-ground experience will help build a more well-rounded discipline that can address the political problems of tomorrow.

whatever they might be. Thus, political science should work toward directing more resources – human, financial, and intellectual – toward under-studied parts of the world.

Collaborating

Our second call is for enhanced collaboration and coordination around field research. This call has several components. First, we strongly encourage scholars to consider different ways they might make their own field research into a more collaborative enterprise. In 2006, an APSA Working Group on Collaboration noted that collaborative work was expanding significantly in political science, particularly among faculty and students who were asymmetric by rank. We believe it would be hugely beneficial to transfer that spirit to field research in various ways. Collaboration between and among US scholars with complementary strengths and skills is of course fundamental. For instance, collaboration between a scholar better-versed in quantitative methods and another with stronger qualitative skills would encourage a widening of the data-collection net, and expand the types of analysis that could be performed on data gathered in the field. But fieldworkers might also coordinate more closely, for instance, with researchers or others in the contexts that they study – for instance, with those who have language skills that they lack, or who have mastered the deployment of certain data-collection techniques in those contexts. Developing ethical, productive, and mutually beneficial partnerships of these types – and maintaining objectivity while doing so – are continuing challenges for field research, and should be topics of significant debate.

Another way in which political scientists who conduct field research can act in a collaborative manner is by sharing their data, as well as information and ideas about field research. Data sharing is a key tenet of research transparency, one of the principles underlying good field research. Yet collaboration can and should go beyond sharing data. Ideas about and strategies for conducting fieldwork are often shared informally among small subsets of students, between students and mentors who have conducted field research, or among pairs of faculty who have done so. Even for those who are part of such networks, the information relayed is usually partial in at least two related ways. First, these conversations cannot thoroughly cover all of the topics relevant and critical to field research. Second, and more generally, the individual perspectives and particular experiences of a few students or faculty cannot possibly reflect the richness and heterogeneity of fieldwork in the discipline.

This imperfect situation should be addressed, in part, through the development of online field research information resources. For instance, the Methods Coordination Project (MCP), an online bibliography curated by coordinators with expertise in different methodological areas, provides lists of readings concerning a variety of data-collection techniques, as well as writing about field research more generally.¹⁰⁰ Future iterations of MCP will allow users to interact with one another, and to share information on particular topics or geographical locations. Moreover, in close association with this book project, we are developing an independent web site that will allow scholars to share their field research experiences and the fieldwork practices and strategies they have developed.¹⁰¹ The site will offer resources such as templates for organizing materials, and for letters requesting affiliation, introducing oneself and one's project, or inviting participation in a study. Ultimately, we hope that interactive fora will develop in which researchers leaving for, working in, or returning from field sites around the globe can exchange basic logistical information, contacts, and ideas. Our hope is that field researchers from the United States and around the world will find new ways to communicate about past experiences and future plans, helping each other and everyone to do better field research.

Thinking and writing about field research

We hope this book advances, and lends energy and impetus to, emerging conversations about whether, when, where, how, and why political scientists should conduct field research. Our call on this front is a simple one: we encourage scholars to join the conversation. Just as ours are not the first words on any of the many complex issues raised in this book, they hardly can be the last. We challenge scholars to strongly disagree with us, to draw, build and improve on what we have offered here, and to innovate in many other directions. By thinking and working together, we can construct a strong intellectual infrastructure guiding the conduct of field research.

If the attitudes of the colleagues whom we had the pleasure of interviewing in the course of our research for this book are any indication, political scientists have much to contribute to this dialogue. As we noted before, more

¹⁰⁰ The MCP is available online at <https://qdr.syr.edu/mcp>; its URL may change.

¹⁰¹ The web site can be found at www.psfieldresearch.com.

often than not, these interviews extended far beyond an hour as faculty and graduate students carefully related the challenges they faced and the solutions they devised in the field, forthrightly divulged their mistakes to us, proudly shared their successes, and clearly articulated what they learned from it all. At many points during these conversations, respondents also expressed the wish to know how others had handled similar dilemmas in the field. We were left with the enduring impression that there is an unmet need for careful consideration of fieldwork in political science.

We very much hope our book can accelerate ongoing conversations, spark a wide range of new debates, and inspire scholars to *write about* and publish on their fieldwork experiences. They might do so by penning stand-alone methodological pieces. But just as important are more explicit and detailed narratives, in substantive work based on field research, of political scientists' research strategies, the methodological and ethical dilemmas they faced in the field, the criteria they used to adjudicate among solutions, the choices they made, and the outcomes they engendered. To the degree possible, these narratives can be integrated into the body of books and articles; when space limitations impinge, they could be included as web appendices, for instance. Heeding this call, which is of course in line with initiatives for greater research transparency, would advance the disciplinary dialogue concerning the practices and value of field research, *and* facilitate the teaching of field research methodologies, discussed below.

Re-envisioning graduate methods training

Across the United States, graduate programs in political science uniformly emphasize methods courses that teach students techniques for data *analysis*. The importance of learning how to deploy tools of data *collection* effectively is immensely underappreciated. Gaining the skills to collect data carefully and systematically, particularly in the context of field research, is at least as crucial for doing good research as learning how to analyze data. Without precision with regard to data collection, scholars' analyses may lose meaning: garbage in, garbage out.

Given this reality, we call on graduate programs to reconsider the structure of their methods requirements. As it stands, students are often required to take three, four, or even five methods courses, while the pressure to complete graduate studies in a timely manner has not abated. These courses are critical for students to gain data-analysis skills. Yet this requirement often prevents students from taking courses that would provide them with

the tools they need to be effective at data collection, such as language courses,¹⁰² courses on ethnography or interviewing techniques, or courses focusing on particular geographical regions in the United States or around the world. We urge graduate programs to afford students who wish to engage in field research the time to take these sorts of courses, *and to award them credit for doing so*. Taking these courses would make students far more effective at fieldwork; moreover, as Agarwala and Teitelbaum's (2010) alarming study makes clear, the knowledge gained from such courses can be immensely important for securing funding for field research. To be clear, those who engage in fieldwork should also be required to take a range of courses on data analysis, and become conversant in multiple analytic techniques. Our simple proposal is that students *also* have the opportunity to take, and receive the appropriate credit for taking, the courses that will help them to carry out their inquiries most effectively.

We also strongly recommend that graduate programs develop, and consistently offer, stand-alone courses on field research.¹⁰³ To be clear, we refer here not to qualitative methods courses that have a week or two on interviewing or archival research, but to full quarter- or semester-long courses focused completely on preparing for and carrying out field research, and engaging in the multiple data-collection techniques discussed in this book. The significant commonalities that mark field research in the discipline make it possible to include such instruction in graduate education, and the intrinsic difficulty of carrying out field research effectively makes it critical to do so. The goal of such courses would not be to standardize field research practices, but rather to more systematically share lessons about how to design, prepare, and manage fieldwork.¹⁰⁴

Offering such courses would provide multiple benefits. Ideally, they would incorporate readings on and discussions of how field research methods and practices relate to the range of topics covered in qualitative and quantitative methods courses, clarifying the sometimes tenuous connections

¹⁰² As one expert respondent put it, rather bluntly, "you're going to do something terribly incompetent, or you're going to know the language" (interview, LM-18, September 14, 2012).

¹⁰³ As one interview respondent put it, in many graduate programs, the current attitude toward such courses is one of "benign neglect" (interview, BR-9, August 16, 2012).

¹⁰⁴ There are of course existing opportunities to learn about field research. Short courses on field research are already taught at APSA, and at the summer Institute on Qualitative and Multi-Method Research. These courses have significant value and are a critical foundation for many students in graduate programs that do not offer field methods courses. However, these courses are extremely compressed; as a result, heated discussions must be cut short, nuanced points simplified, and practicing techniques shortchanged.

between data collection and data analysis. Indeed, as we have noted, field research is relevant for research design, concept formation, gaining causal leverage, and many other crucial analytic tasks. Likewise, the ways in which scholars design their projects and plan to deploy qualitative or quantitative analytic methods have a range of implications for field research design and execution. Further, advanced reading, reflection, and preparation for field research will help scholars design stronger research projects (and write more specific dissertation prospectuses), and will reduce uncertainty heading into the field. They will also enable researchers to make better snap decisions, develop more effective contingency plans, and revise their field research strategies in appropriate ways when they encounter obstacles in the field.

Such courses would also expose students to a range of experiences and practices and provide them with space and time to digest and discuss what they are learning. First, such classes would call on them to critically reflect on the relative value of various approaches and strategies to fieldwork. Since much of the published literature on fieldwork methodologies is written from the perspective of other social science disciplines, such courses could also help students to translate the insights from those literatures into the context of political science. Further, students would benefit from having a forum for engaged discussion about the texts, rather than having to process the debates on their own. Finally, such courses would give students the opportunity to practice techniques they might use in their own projects, and develop the skills to evaluate other scholars' field research. Graduate students have gotten the signal from the discipline that mixed method research is valued, but they are infrequently given the tools to do it well.

These proposals for re-envisioning graduate methods training will doubtless be controversial. Students always face tradeoffs in balancing required field and method seminars during their short period of active coursework. Department chairs, graduate directors, and faculty are under increasing pressures to ensure graduate students make "normal progress" and finish their degrees in a timely manner. Yet the undeniable truth is that preparation is critical for effective field research. We should not encourage graduate students to parachute into an unknown place and commence research without the benefit of instruction in techniques and approaches that have proven effective for generations of political scientists. The methodologies of field research, and the ancillary skills needed to do it effectively, can be taught and should be an important component of graduate education in political science.

Recognizing the contributions of field research

Most political science departments assess a scholar's productivity during graduate school, recruitment, promotion, and merit reviews in terms of the quantity and quality of articles and books published (in addition to evaluating their teaching effectiveness and service contributions), and the time it took the scholar to produce them. Thus, field research is rewarded insofar as it results in dissertations and publications in what the discipline considers a reasonable timeframe. This is not fundamentally wrong; after all, the primary purpose of field research is to create new knowledge. It is thus reasonable to assess the value of fieldwork, in part, by evaluating the knowledge it generates – the publications a scholar is able to produce on its basis.

Still, this arguably creates inequities and disincentives for field research. As our interviewees and survey data have attested, fieldwork has many costs. Preparing to carry it out, securing funding, and actually conducting field research are extremely time-consuming, for instance, and the second of these introduces a great deal of uncertainty into one's academic trajectory. As our survey results show, many scholars spend significant amounts of time in the field – and these numbers do not reflect the time intense preparation for fieldwork takes. Of course, subjecting oneself to these costs, and finding ways to overcome the significant challenges and hardships that fieldwork itself can entail, is a choice; no one is *forced* to do field research. Nonetheless, as we have sought to demonstrate throughout this book, for some of the questions that political scientists wish to ask and answer, there is no other way to gather the necessary information, no other way to identify the relevant dynamics – no other way to create the public good that knowledge represents – than through “being there.” And “being there” has costs.

Moreover, publications alone do not fully reflect the value that field research creates. Fieldwork, particularly when guided by the principles we have identified, enables scholars to deepen the discipline's general understanding of politics throughout the United States and the world. It brings – and brings alive – knowledge about critical places that the vast majority of us will never visit, and allows it to accumulate. It allows us to knit important international connections and build rich epistemic communities. It allows scholars who have done fieldwork in a particular location to better evaluate the research of others who study that location. It allows faculty to guide and train graduate students on crucial forms of inquiry. And it helps political scientists to contribute much more – and much more authoritatively – to public debate, and, in some circumstances, to key foreign policy decisions. In

other words, we all benefit handsomely, in multiple ways, from the fieldwork a subset of us does.

Given the time fieldwork takes to execute, and the enduring value of the contributions it enables scholars to make, we believe that departments, universities, and professional associations should reward fieldwork with greater institutional recognition. First, departments should acknowledge the time required for fieldwork when evaluating the progress of graduate students and the productivity of job candidates and of faculty coming up for tenure and promotion. They should take into account the fact that amassing original data and accumulating understanding through layered learning in the field requires time – time that scholars who can take advantage of ready-made data sources are able to spend writing. Second, while the value that good fieldwork adds *beyond* that which is reflected in the publications scholars write based on field research is difficult to assess, it unarguably exists, and should be rewarded – perhaps through the establishment of additional prizes or awards for outstanding fieldwork along the lines of that already created by APSA’s Comparative Democratization section, and certainly in political science departments’ periodic evaluations of faculty. The discipline, in other words, should establish standards of productivity that fairly reflect the special kinds of work and effort that field research requires, and the unique and multi-faceted contributions it makes to political knowledge.

To conclude: we hope this book helps to propel an open and fruitful disciplinary debate that moves us toward accomplishing the five goals just outlined. Doing so, we are convinced, will encourage members of the profession to do more field research and help them to do it *well*. In this way, political scientists will continue to produce cutting-edge, standard-setting scholarship that provides compelling answers to significant political questions.

Appendix: Methodology for survey and in-depth interviews

The Field Research in Political Science survey

Why *survey* our political scientist brethren about their field research? This may seem a surprising component of a work of methodology, a genre that contains more prescription than description. Though our book does, among other things, put forward suggestions for how to conduct field research as efficiently as possible (best practices), obtaining a baseline of what people do in the field (existing practices) was also important. Such a survey of the profession as a whole has never been done before. Without a broad empirical picture of what colleagues do and have done, those who write about field research and its history run the risk of mischaracterizing the actual state of things. In dispensing advice on any area of human affairs (marriage, business leadership, waging war), there is a serious danger of over-generalizing from one's own experiences. In addition to providing essential context for the book's prescriptive arguments, and its explication of the ways in which field research contributes to knowledge, we also believe that the survey results will be of use to many people. That includes, for instance, political scientists who do or are considering fieldwork, or who advise students and plan curricula. Colleagues in other fields, administrators, and funding organizations may also benefit from the findings.

The Field Research in Political Science web-based survey of faculty went into the field beginning on November 20, 2011, and the last responses were received in the summer of 2012. The instrument was developed over the course of half a year and three rounds of pilot testing, in consultation with survey methodologists at the University of California at Berkeley, Northwestern University, and Indiana University. In the survey we defined conducting *field research* as “leaving your home institution to collect data or information that significantly informs your research.” As the instructions to respondents indicated, this definition includes trips of any duration, to field sites near or far, to collect information in any form. Archival research,

interviews, field experiments, surveys, participant observation, ethnography, and more can all be part of fieldwork.¹ In the course of writing this book we opted to expand our definition of field research slightly, to “leaving one’s home institution in order to acquire data, information, or insights that significantly inform one’s research.” The addition of “insights” highlights, for the reader’s benefit, our theme that field research is about more than just the accumulation of data, but we are confident that the survey would not have been meaningfully different had we included this word in the definition there.²

It would be possible to ask political scientists questions about their field research practices *in toto* or in general, but (particularly for experienced scholars) that would mean inquiring about diverse activities spanning long periods of time, the answers to which could only be vague. Instead, the survey was structured around the individual *field research project*. This was defined as an academic research project, of which field research was one component, aimed at producing scholarly work such as a conference paper, an article or set of articles, a dissertation, or a book.³ Respondents were asked a set of questions about their preparation for field research, and (at the end) other questions about their backgrounds and several open-ended questions about lessons learned in the field. The core of the survey consisted of batteries of questions focusing on specific field research projects. Respondents were given one such battery concerning their *first* field research project, then another about their *most recent* project (if any other projects had been undertaken and completed, or nearly completed, since the first project).

¹ To help clarify the meaning of “field research,” so that all respondents might think about it in the same ways, the survey included the following information: “One’s own personal presence at the field site(s) is an integral part of our definition. If you sent a graduate student to a field site to do research on your behalf, then the student did field research, but you did not. If you spent a month in the field training RAs who continued working for two months after you left, then you did a month of field research. Traveling to other institutions to have conversations with colleagues there is considered field research, if what is learned from those conversations constitutes information that significantly informs your research. Conducting interviews by telephone from your home institution, however, is not considered field research. Checking out books from the library at a nearby university is not field research, but taking notes on an archive collection at that university is. Accessing data in remote locations via the internet would not be considered field research, but traveling in person to obtain access to existing datasets would.”

² It is hard to imagine a scholar setting out on a field research project seeking only “insights” and not either “data” or “information” of any kind.

³ The following clarifying information was included: “We are interested in projects on which you were either the primary researcher or one of a group of primary researchers. A single field research project may involve one or many field research trips (close together or far apart in time), to one or multiple locations.”

Those with extensive experience were given the option of completing a third battery about the project that they felt was *most representative* of their field research as a whole.

We aimed to survey the entire profession in a highly inclusive fashion, though to make the project tractable we confined ourselves to colleagues working at US institutions. APSA provided its list of all United States-based political science faculty; thus, our respondents were not limited merely to APSA members. After some cleaning and verification, this provided an initial sampling frame of 10,558 political scientists. In all, invitation emails were sent to a randomly selected sample of 5,188 members of this set. The number of invitations delivered to actual political scientists was 4,962.⁴ Of these, 1,142 people took the survey, yielding a response rate of about 23 percent. The subset of political scientists who agreed to take the survey corresponds closely to the full sampling frame in many observable respects, diverging slightly in others.⁵ It is almost certain, however, that the survey shows a response bias toward those who had conducted field research – despite our hope, stated in the invitation emails, that political scientists of all backgrounds would participate. Only 16.5 percent of respondents had no field research experience and no plans to undertake field research. It seems reasonable to think of the survey as representative of political science faculty who have done field research, though not necessarily of the profession's faculty as a whole. Respondents' average age was forty-seven and average Ph.D. year was 1997.

The faculty survey generated two sets of data: one in which the observations are respondents ($n = 1,142$), and one in which the observations are field research projects reported by those respondents ($n = 1,468$). Chapter 2 presents many results from the survey, and other findings are reported elsewhere in the book. In later articles we will present more detailed analysis of particular topics such as funding, languages, and locations.

⁴ Those whose email accounts produced delivery-failure responses (and for whom no new contact information could be found), those who had left the profession, and those who replied to say they were not political scientists were dropped from the sample.

⁵ Women constituted 37 percent of survey respondents but only 30 percent of the sampling frame. Proportions of political scientists identifying with each of eight major subfields among the respondents are within 3 percentage points of the proportions in the sampling frame, except that comparativists are over-represented by 6 percentage points and theorists are under-represented by 4 percentage points. In terms of rank, adjuncts, assistant professors, associate professors, and full professors constituted 11, 34, 26, and 29 percent of respondents, respectively, and 12, 27, 26, and 34 percent of the sampling frame. Faculty from Ph.D.-granting departments are somewhat overrepresented, at 43 percent of respondents and 38 percent of the sampling frame.

In-depth interviews of political science faculty and graduate students

In addition to the survey, we also conducted in-depth interviews with a diverse group of faculty and a few graduate students from April 2012 through December 2013: 62 scholars in total. These interviews allowed us to probe in more detail how scholars thought about and carried out field research. As noted in the book's chapters, the interviews were designed to last 30 minutes but often spanned over an hour as researchers recounted stories and reflected on their experiences.

We used a purposeful selection strategy to choose the respondents. Our intention was to draw on the expertise of scholars who had conducted and published scholarship based on extensive fieldwork in a variety of places and using different data-collection techniques. The collective experience of the researchers we interviewed covers every continent; both the advanced industrialized and developing world; democratic and authoritarian regimes; and rural and urban settings. For each of the data-collection techniques covered in the book, we have interviewed at least 11 and up to 22 scholars who have employed it previously in the field.

We also aimed for our sample of interviews to capture gender, rank, and subfield diversity in the discipline. We have interviewed 30 men and 32 women. In terms of rank, our respondents include: 3 non-academics, 2 graduate students, 22 assistant professors, 18 associate professors, and 17 full professors. Our sample is heavy on comparativists (42) but also reflects the views of Americanists (7), theorists (2), IR scholars (6), policy specialists (2), and others (3). While political science faculty and graduate students were the target respondents, we also interviewed a handful of faculty in other disciplines where appropriate, including history, sociology, law, and economics.

Each of the co-authors conducted interviews either in-person, by telephone, or via voice-over-internet software. All respondents were guaranteed full anonymity, as we wished to solicit their candid insights on past and current successes and failures. The co-authors each tailored a longer interview guide for individual participants. Our styles varied in terms of how structured the conversations remained during the course of the interview.

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'This outstanding book is a must-read for political science scholars, from faculty members contemplating a new project, to doctoral students exploring dissertation topics, to undergraduates embarking on their first research projects. A masterly analysis of how field research contributes to our understanding of politics, the book synthesizes a broad range of literature and also draws on the field experience of the authors. Despite the diversity of approaches to field research in the discipline, authors not only identify a common core of principles and practices but also suggest how they might be deepened and sharpened.'

ELISABETH JEAN WOOD, Yale University

Field research – leaving one's home institution in order to acquire data, information, or insights that significantly inform one's research – remains indispensable, even in a digitally networked era. This book, the first of its kind in political science, reconsiders the design and execution of field research and explores its role in producing knowledge. First, it offers an empirical overview of fieldwork in the discipline based on a large-scale survey and extensive interviews. Good fieldwork takes diverse forms yet follows a set of common practices and principles. Second, the book demonstrates the analytic benefits of fieldwork, showing how it contributes to our understanding of politics. Finally, it provides intellectual and practical guidance, with chapters on preparing for field research, operating in the field and making analytic progress while collecting data, and on data-collection techniques including archival research, interviewing, ethnography and participant observation, surveys, and field experiments.

Diana Kapiszewski is Assistant Professor in the Department of Government at Georgetown University.

Lauren M. MacLean is Associate Professor in the Department of Political Science at Indiana University.

Benjamin L. Read is Associate Professor in the Politics Department at the University of California, Santa Cruz.

COVER ILLUSTRATION: field research locations reported by US-based political scientists surveyed in 2011-2012. Circle size is proportional to the number of projects that included the location as a research site; purple circles are capitals.

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