General Information

Course
Title: Introduction to methodology – methods of inquiry in development studies
Code: INTD 397
Term: Fall
Year: 2019
Class Times: Mondays and Wednesdays 10h05 to 11h25
Location: ENGM 279
Number of credits: 3

Instructor
Name: Kattie Lussier
Office: Room 240 Peterson Hall, 3460 McTavish street
Email: kattie.lussier@mcgill.ca
Office hours: Mondays and Wednesdays 14h00 to 16h00
Appointments needed for meetings outside of office hours

Teaching assistant
Name
Email
Office hours

Course overview

Synopsis: The study and practice of development is multidisciplinary, which means that development actors often have to work with information from a range of fields. The diversity of people involved in development and the multitude of contexts in which they evolve makes the process of generating knowledge particularly complex. Methodologies, therefore, must be adaptable while remaining rigorous enough to withstand the tests of the various accountability seekers. For this reason, development practitioners and researchers need to be able to draw from a range of methods and tools in order to combine information from various sources.
In this introduction course, students will learn the advantages and limitations of the different methods used in international development and how to combine different data collection tools. This will enable them to make methodological choices better suited to information needs, while taking into account the specific development context and the characteristics of the stakeholders.

The focus of the course will be on mixed methods and how to combine quantitative, qualitative and participatory data. It will be divided in four parts: understanding methodological issues in development studies, collecting data, analyzing data, and making sense of information gathered from various sources. In addition to using more familiar data collection tools such as questionnaires, interviews and focus groups, students will be required to engage in participatory exercises such as transect walks, participatory mapping, ranking and scoring, participatory diagrams and various forms of brain-storming.

The introduction to methodology course is suited to all development students, regardless of their background, and does not require any prior statistical or mathematical knowledge. Since the international development program already provides students with different courses enabling them to master more advanced quantitative methods, this course will put more emphasis on information gathered with qualitative and participatory methods and how to combine their insights with descriptive statistics from questionnaires or secondary sources of data.

**Courses’ Contribution**

This course is important to all development students because methods of inquiry are used by both development researchers and practitioners. Whether a person is more interested in policy making, in knowledge generation, or in finding out information to better intervene in the field and improve development interventions, the understanding and use of methodologies is necessary. This course will also be particularly useful to students wishing to undertake a personal research project, either as part of their program or a post graduate degree, as well as those who want to work amongst a research team one day.

**Instructional methods**

The course will use a mix of methods including lectures, plenary sessions, small group practical exercises (practicum) and discussions. The material used during the lectures will be uploaded to myCourses weekly. Other important information and material will also be shared through myCourses. Students should therefore consult it regularly. Polling@McGill will be used for formative purposes only. Students are encouraged to download the application (see https://mcgill.ca/polling/ for further information) but the answers they will provide through the app will not be part of the evaluation.
**Organization**

Mondays will be dedicated to lectures and from week four onward, with the exception week 7, Wednesdays will be dedicated to practicum and discussions. Attendance to these classes is mandatory in order not to penalise other team members by delaying their work. Attendance and participation during practicums are the key elements on which the 10% participation mark will be given.

**Lectures**

Students are expected to do their readings before each class and, from times to times, will be requested to watch short videos online before class. Students are strongly encouraged to participate in the lectures by sharing their ideas and experiences and by asking questions.

**Practicum**

Practicum will be conducted both in small groups and individually.

The group assignments are as follow
- A video recording of a participatory exercise (10%)
- The planning of simple participatory workshop (10%)
- An equity scorecard (10%)

**Learning**

**Aim**

This course aims to familiarize students with the main methodological approaches used in development study and practice, their characteristics and the common methods and tools that underpins them.

**Objectives**

At the end of the course, students are expected to be able to
- discuss the strengths and limitations of different methods of development inquiry;
- explain the criteria on which a methodology should be assessed;
- select methods of inquiry adapted to particular contexts and stakeholders;
- identify data collection tools best suited to respond to information needs;
- formulate questions that are appropriate to respondents’ characteristics and the context of inquiry;
- make sense of data from various sources.

**Competencies**

- Develop a data collection tool adapted to the situation and stakeholders
- Plan a simple participatory workshop
- Collect data using participatory tools
- Conduct simple data analysis
- Discuss and interpret a mixed data set
- Produce an equity scorecard from quantitative data

**Soft skills**

- Team work
- Inter-personal skills
- Planning skills
- Analytical skills
Evaluation

Means of evaluation and ponderation

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment 1: Data collection tool (Questionnaire or Interview protocol)</td>
<td>30%</td>
</tr>
<tr>
<td>Assignment 2: Discussion and interpretation of a mixed data set</td>
<td>30%</td>
</tr>
<tr>
<td>Practicum (group assignments): 3 Practicum at 10% each</td>
<td>30%</td>
</tr>
<tr>
<td>Participation in class activities</td>
<td>10%</td>
</tr>
</tbody>
</table>

Evaluation criteria for practicum

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall quality of the assignment</td>
<td>1/2</td>
</tr>
<tr>
<td>Procedures are respected</td>
<td>1/2</td>
</tr>
<tr>
<td>Assignment is complete</td>
<td>1/2</td>
</tr>
<tr>
<td>Information is relevant</td>
<td>1/2</td>
</tr>
<tr>
<td>Information is clear</td>
<td>1/2</td>
</tr>
</tbody>
</table>

Information on assignments

Individual assignments

- Mid-term assignment → Data collection tool
  For their mid-term assignment, students will have the choice between developing a survey questionnaire or an interview protocol. In both cases students will have to provide the contextual information regarding the study for which the tool is developed such as the purpose of the study, the location, the overarching research questions, the stakeholders and the sampling strategy. The different items (questions) in the tool must be adapted to the characteristics of the respondents and respect the main criteria provided in class.

  Submission date: October 16th (Week 7)

- Final assignment → Discussion and interpretation of a mixed dataset
  For their final assignment, students will receive a set of quantitative, qualitative and participatory data. They will need to make sense of them, discuss their findings, and formulate conclusions and recommendations. The length of the assignment to be submitted should be no longer than 5 pages. Students will receive the data 2 weeks before submission date.

  Submission date: December 3rd (Week 14)

Group assignments

- Planning a simple participatory workshop
  Each group will select a study context and an overarching inquiry question. They will write the plan of 1-day participatory workshop with the key stakeholders. The plans will include the categories and number of participants, the activities and tools, the schedule of the workshop, and the means to take gender and diversity into account to make sure that all voices are heard and respected.

- Video recording of participatory data collection exercise
  Each team will select a research question and from 2 to 4 participatory data collection tools and administer them to a group of at least 5 persons. These activities will be recorded on video. After the data is collected, the team will summarize their conclusions from the exercise, identify what worked well and what they would do differently the next
time. These will also be recorded on video. There is no need to submit written material for this assignment. The total data collection time should not exceed 1 hour, and the reflective part should be between 5 and 10 minutes. There is no need to rent or borrow video equipment. The use of a mobile phone is sufficient for this assignment.

- Equity scorecard
  Each team will develop an equity scorecard using the quantitative data provided and write a paragraph to explain what they conclude from the scorecard. This assignment will require the use of SPSS software. Information on how to access the software will be provided in class.

More details on the assignments will be provided in class and the evaluation grid will be available on myCourses.

Late assignments will be penalized for each day of delay. In cases of force majeure, students should contact the instructor as soon as possible to discuss the possibility of an extension.

**Course Schedule**

<table>
<thead>
<tr>
<th>Dates</th>
<th>Topics covered</th>
<th>Activities</th>
<th>To do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>Introduction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 4</td>
<td>Presentation of syllabus</td>
<td>Lecture</td>
<td>Reading 1</td>
</tr>
<tr>
<td></td>
<td>Terminology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 2</td>
<td>Knowledge and development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 9</td>
<td>What is there to know?</td>
<td>Lecture</td>
<td>Reading 2</td>
</tr>
<tr>
<td></td>
<td>Who needs to know what?</td>
<td>Discussions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Who’s knowledge matter and why?</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Embracing complexity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 11</td>
<td>Data needs (research and practice)</td>
<td>Lecture</td>
<td>Reading 3</td>
</tr>
<tr>
<td></td>
<td>How is information used and for what purpose?</td>
<td>Discussions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Biases and blind spots</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 3</td>
<td>Research design and methods of enquiry in development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 16</td>
<td>Development actors and epistemology</td>
<td>Lecture</td>
<td>Reading 4</td>
</tr>
<tr>
<td></td>
<td>Types of studies</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Categories of methods of inquiry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 18</td>
<td>Types of quantitative methods</td>
<td>Lecture</td>
<td>Reading 5</td>
</tr>
<tr>
<td></td>
<td>Types of qualitative methods</td>
<td>Discussions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other methods of inquiry (GIS, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Selection criteria &amp; factors to consider</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 4</td>
<td>Data collection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 23</td>
<td>Ethical concerns</td>
<td>Lecture</td>
<td>McGill’s Research Ethics</td>
</tr>
<tr>
<td></td>
<td>Gender considerations</td>
<td></td>
<td>Online Tutorial</td>
</tr>
<tr>
<td></td>
<td>Context of inquiry and positionality</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Stakeholders &amp; study participants</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sampling strategies</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Indicators and variables</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 25</td>
<td>Planning for data collection</td>
<td>Practicum - team</td>
<td>Reading 7</td>
</tr>
<tr>
<td></td>
<td>Stakeholders’ analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Factors to consider</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contextual and logistical concerns</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Week 5</td>
<td>Tools for qualitative data collection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------</td>
<td>--------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 30</td>
<td>Types of interviews &amp; protocols&lt;br&gt;Collecting data from groups</td>
<td>Lecture</td>
<td>Work on data collection tool</td>
</tr>
<tr>
<td>Oct 2</td>
<td>Simulation of focus group</td>
<td>Practicum</td>
<td>Reading 8</td>
</tr>
<tr>
<td>Week 6</td>
<td>Tools for quantitative data collection</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oct 7</td>
<td>Sources of secondary data for development&lt;br&gt;Surveys and Census&lt;br&gt;Characteristic of a good question</td>
<td>Lecture</td>
<td>Work on data collection tool</td>
</tr>
<tr>
<td>Oct 9</td>
<td>Writing items for a questionnaire</td>
<td>Practicum - team</td>
<td>Watch videos</td>
</tr>
<tr>
<td>Week 7</td>
<td>Participatory data collection tools</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oct 14</td>
<td>Thanksgiving No class</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oct 16</td>
<td>Categories of participatory tools&lt;br&gt;Attitude of the facilitator&lt;br&gt;Ethics</td>
<td>Lecture</td>
<td>Submit data collection tool&lt;br&gt;Watch videos</td>
</tr>
<tr>
<td>Week 8</td>
<td>Collecting participatory data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oct 21</td>
<td>Participatory workshops&lt;br&gt;Dealing with vulnerability&lt;br&gt;Inclusion of marginalized people</td>
<td>Lecture</td>
<td>Explore participatory resources&lt;br&gt;Submit Ethics form</td>
</tr>
<tr>
<td>Oct 23</td>
<td>Mapping and Transect walk^</td>
<td>Practicum</td>
<td>Reading 9</td>
</tr>
<tr>
<td>Week 9</td>
<td>Using participatory tools and making sense of the information they generate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oct 28</td>
<td>Brainstorming&lt;br&gt;Ranking and scoring&lt;br&gt;Participatory diagrams</td>
<td>Lecture</td>
<td>Explore participatory resources</td>
</tr>
<tr>
<td>Oct 30</td>
<td>Planning a workshop</td>
<td>Practicum - team</td>
<td>Work on plan</td>
</tr>
<tr>
<td>Week 10</td>
<td>Analyzing data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov 4</td>
<td>Approaches to data analysis</td>
<td>Lecture</td>
<td>Finalize plan</td>
</tr>
<tr>
<td>Nov 6</td>
<td>Different ways of making sense</td>
<td>Practicum - team</td>
<td>Submit workshop plan (team)</td>
</tr>
<tr>
<td>Week 11</td>
<td>Making sense of qualitative data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov 11</td>
<td>Manual vs computer-assisted analysis&lt;br&gt;Coding process&lt;br&gt;Avoiding bias</td>
<td>Lecture</td>
<td>Watch video&lt;br&gt;Work on participatory exercise</td>
</tr>
<tr>
<td>Nov 13</td>
<td>Analyzing qualitative data</td>
<td>Practicum</td>
<td>Submit video (team)&lt;br&gt;Reading 10</td>
</tr>
<tr>
<td>Week 12</td>
<td>Making sense of quantitative data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov 18</td>
<td>Type of analysis&lt;br&gt;Descriptive statistics&lt;br&gt;Intersecting gender with other social exclusion factors</td>
<td>Lecture</td>
<td>Reading 11</td>
</tr>
<tr>
<td>Nov 20</td>
<td>Developing an equity scorecard</td>
<td>Practicum - team</td>
<td>Work on ESC</td>
</tr>
<tr>
<td>Week 13</td>
<td>Combining multiple sources of data – mixed methods</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov 25</td>
<td>Importance of triangulation&lt;br&gt;Understanding the audience&lt;br&gt;Dealing with contradicting information&lt;br&gt;Presenting information</td>
<td>Lecture</td>
<td>Reading 12&lt;br&gt;Work on data interpretation</td>
</tr>
<tr>
<td>Nov 27</td>
<td>Interpreting mixed data and communicating findings</td>
<td>Practicum</td>
<td>Submit Equity Scorecard (team)</td>
</tr>
<tr>
<td>Week 14</td>
<td>Synthesis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dec 2</td>
<td>Policy briefs</td>
<td>Lecture</td>
<td>Work on data interpretation</td>
</tr>
<tr>
<td>Dec 3</td>
<td>Synthesis and conclusion</td>
<td>Q&amp;A session</td>
<td>Submit data interpretation</td>
</tr>
</tbody>
</table>
Course Materials

All course materials will be available on myCourses or from McGill’s online library. In order to preserve our environment, students are encouraged to print only when necessary.

Key References:


Ffrench-Constant, L. (undated) *How to plan, write and communicate an effective policy brief*. Manchester: Research to Action


(Open Access: http://documents.worldbank.org/curated/en/726001468331753353/pdf/350340The0Powe1n0REVO1OFFICIAL0USE1.pdf)


(McGill Ebook https://mcgill.on.worldcat.org/oclc/646809046)


(McGill Ebook https://mcgill.on.worldcat.org/oclc/458769159)

Participatory Resources:

- VSO (undated) ‘Participatory Approaches: A facilitator’s guide’.

Other Resources:

Kranias, G., Participatory Evaluation Toolkit. Toronto: HCLink
Useful Websites:

Tools4dev http://www.tools4dev.org/
Participatory methods.org https://www.participatorymethods.org
Research to Action https://www.researchtoaction.org
World Bank Open Data https://data.worldbank.org
Google Public Data Explorer https://www.google.com/publicdata/directory
Eldis https://www.eldis.org

Weekly readings

Reading 1:


Reading 2:

Reading 3:


Reading 4:
Yin, R. K. (2018) chapter 1 ‘Getting started: How to know whether and when to use the case study as a research method’ in Case Study Research and Applications. 6th edn. London: Sage


Also suggested (not mandatory)

Reading 5:

Also Suggested (not mandatory):

Reading 6:

Reading 7:

Also suggested (not mandatory):

Reading 8:

Also Suggested (not mandatory):
Reading 9:


Reading 10:
Lussier (undated) Intersectionality in development research: the creation and use of equity scorecards. Montreal: ISID

Reading 11:


Reading 12:


Ffrench-Constant, L. (undated) How to plan, write and communicate and effective policy brief. Manchester: Research to Action

Also Suggested (not mandatory):

Institutional Policies

Academic Integrity / Plagiarism

McGill University values academic integrity. Therefore, all students must understand the meaning and consequences of cheating, plagiarism and other academic offences under the Code of Student Conduct and Disciplinary Procedures1 (see www.mcgill.ca/students/srr/honest/ for more information).

---

1 The content below comes from McGill’s Course outline guide, 2019
Language of Submission

In accord with McGill University’s Charter of Students’ Rights, students in this course have the right to submit in English or in French any written work that is to be graded. This does not apply to courses in which acquiring proficiency in a language is one of the objectives.

Conformément à la Charte des droits de l’étudiant de l’Université McGill, chaque étudiant a le droit de soumettre en français ou en anglais tout travail écrit devant être noté (sauf dans le cas des cours dont l’un des objets est la maîtrise d’une langue).

Course Evaluation

End-of-course evaluations are one of the ways that McGill works towards maintaining and improving the quality of courses and the student’s learning experience. You will be notified by e-mail when the evaluations are available on Mercury, the online course evaluation system. Please note that a minimum number of responses must be received for results to be available to students.

Special needs

As the instructor of this course I endeavor to provide an inclusive learning environment. However, if you experience barriers to learning in this course, do not hesitate to discuss them with me and the Office for Students with Disabilities, 514-398-6009.

If you have a hearing, visual and mobility impairment, please contact me immediately (in advance of any evaluations or other class requirements).

Other policies

Additional policies governing academic issues which affect students can be found in the McGill Charter of Students’ Rights (see document).

McGill has policies on sustainability, paper use and other initiatives to promote a culture of sustainability at McGill. (See the Office of Sustainability.)
*Nota Bene*

In the event of extraordinary circumstances beyond the University’s control, the content and/or evaluation scheme in this course is subject to change.

**Acknowledgement**

McGill University is on land which has long served as a site of meeting and exchange amongst Indigenous peoples, including the Haudenosaunee and Anishinabeg nations. We acknowledge and thank the diverse Indigenous people whose footsteps have marked this territory on which peoples of the world now gather.

L’Université McGill est sur un emplacement qui a longtemps servi de lieu de rencontre et d’échange entre les peuples autochtones, y compris les nations Haudenosaunee et Anishinabeg. Nous reconnaissons et remercions les divers peuples autochtones dont les pas ont marqué ce territoire sur lequel les peuples du monde entier se réunissent maintenant.

\[\text{Depending on the weather, this activity may be conducted on another day}\]

1 Depending on the weather, this activity may be conducted on another day