Advanced qualitative methods: case histories of families over three or four generations.

A course proposed for the Centre for Social Studies by Daniel Bertaux, Research Director at the CNRS, Paris, France.

The objective of this 20 hours course is to initiate students to the 'philosophy' of case study and case history approach, first through a series of lectures (10 hours), then through the practice of making a case history of a specific 'object', their own family (going back to the grand parents, possibly the great grandparents); finally through its presentation and discussion by the teacher and the class.

Course content.

The first series of lectures introduces students, which are usually familiarised with the hypothetico-deductive philosophy of survey research, with an altogether different sociological approach to the study of social phenomena, the case study and case history method. The two types of method are contrasted; the virtues and built-in limits of both are underlined; students learn not to apply criteria actually deriving from survey research tradition (representativity, generalisability of results, etc.) to a type of method which has its own, no less rigorous but quite different criteria.

Towards the end of this first series of lectures students are asked to pick up a family (they usually take their own, but are left free to take up another one) and given precise guidelines about how to proceed to make a case history of it: whom to interview, what to focus on (which kind of sociological processes: e.g. family capitals and subjective resources, social mobility, transmissions between generations, local contexts), how to assemble the information, how to write up the case history. Some theoretical tools are proposed, e.g. Bourdieu's three kinds of family 'capitals' and their degree of 'transmissibility' to children and grand children; or gender relations and their change. Students are asked to apply concepts critically in their case history, without 'forcing' the data, and only if their application brings added interpretive value to the narrative.

Given the turbulent and often tragic history of countries from where CEU students come, the histories of their families are often full of dramatic events, whose account by older kin lay bare the real rules of the games that were played in such societies (games of competition for power and for security, to begin with). There is also much of social mobility in such families, both up AND down; and students are invited to reflect upon such instances, e.g. to identify social processes that may have also impinged on hundreds of thousands of other lives at the same time.

After this first series of lectures the students are given a few weeks to make up a family case history. Then the teacher comes back and they present their case history to the class, having first drawn the genealogical graph on the blackboard. An added feature, which makes such presentations much more vivid and interactive, is that after each description of a given couple in the kinship graph - say, EGO's grand-parents on the father side - the student stops and it is up to the class and the teacher to try and guess what has become of each their children, on the basis of knowledge just presented about who these grand parents were, where they lived, what were their occupations. When the 'guesses' are stabilised, the student tells about the actual destinies of grand-parents' children when they grew up; then she moves on to the couples they formed, describing who were their spouses; and again, the class must guess what happened to the children of these couples.

From experience one can say that students show high motivation in working on their case history, and that some at least are able to use it as a stepping stone towards better understanding of their own society, its past and its on-going present, and the social rules that inform its dynamics.

Academic objectives of the course.

The academic objectives concern two levels: one is methodological (initiation to the philosophy of the case history method); the second one is 'applied theoretical', inasmuch as many examples are given of the application of theoretical concepts (which often remain otherwise highly abstract to students) to very concrete social and historical realities.

Planned learning outcomes.

The course is only an introduction to a type of sociological method which is still very little known in Central and Eastern Europe. To further their knowledge on it they would have to do much reading. The focus is rather on providing them with a first experience of making a case history, on a object which is durably relevant to them; and in doing so, to make them learn 'how it works', and learn also that they are able to do it rather well. It is hoped that if students feel positive after this first experience, which they seem to do, some of them at least will be willing to extend by themselves their knowledge of the 'qualitative', meaning here case study, method; and that others will at least change their views about the validity and sociological value of it.

With earlier groups of students, who had often only short knowledge of what sociology is about, epistemological and conceptual sophistication was kept low, and lectures were limited to the presentation of some robust points. But this last year, with a new group that had already acquired more extensive knowledge, that level has been raised successfully.
Reading list.

Some sociological studies of social mobility using case histories of families, all published in the same volume, are given to read as good examples of family case histories oriented towards social mobility processes:

Daniel Bertaux, *Transmission in Extreme Situations: Russian Families Expropriated by the October Revolution* (about downward mobility, and sometimes rebound, of descendants of formerly tsarist elites in Russia)

Rudolf Andorka: *Social Mobility in Hungary since the Second World War: Interpretations through Surveys and through Family Histories* (where the respective values of the two main methods are compared by a famous demographer and quantitative sociologist)

Daniel Bertaux and Isabelle Bertaux-Wiame: *Heritage and its Lineage: a Case History of Transmission and Social Mobility over Five Generations* (the history of a French baker’s descendence and of the bakery he founded in a provincial town, from its creation in the early XXth century to its transformation by one son into a seeds shop, then by a grandson into a cattlefood small factory.; an analysis through which one eventually discovers how its core hidden resource, the goodwill of peasants in the surrounding countryside, has been maintained throughout time)

Giovanni Contini, *The Local World View: Social Change and Memory in Three Tuscan Communes* (where the author shows how three apparently similar villages in Tuscany have known highly varied and unexpected destinies during the last fifty years, generating very different flows of upward and downward mobility for their inhabitants and their descendants).

All four papers have been published in Daniel Bertaux and Paul Thompson Eds: *Pathways to Social Class. A Qualitative Approach to Social Mobility*, Oxford, Clarendon (Oxford University) Press, 1997; a volume which also contains papers by such British scholars as Paul Thompson, David Vincent, Brian Elliott and Mike Savage.