

Chapter 2

Research Methods

Introduction

This chapter outlines the research methods employed in the thesis. The first section will discuss the specific qualitative methods used during the research and the writing phases, which often coincided. A description of the design of the research project and why I adopted this particular study design will follow. Finally, the limitations of the research process will be discussed.

Study Design and Rationale

In order to examine Calhoun's apparent shift from a more nationalist to a more states' rights position, a timeline was created of Calhoun's political career, beginning with his early activity in the South Carolina legislature and ending with his writings in the early 1830s. Noted along this timeline are Calhoun's own writings and the major issues and events that touched upon nationalism and states' rights in the United States. The 1830s were chosen as a cut-off point for examination because it was during the 1830s that many of the issues that highlighted the nationalism/sectionalism debate plateaued in terms of their controversial nature. Therefore, legislative actions on the National Bank, internal improvement projects and protective tariffs will be traced from the years following the War of 1812 until the early 1830s, approximately a fifteen-year time span.¹

Calhoun's ideas regarding federal-state relations are the primary focus of the thesis. Essentially, any similarities and differences in Calhoun's emphases and values before and after his shift in position are of principal importance. As one will see, the examination of

¹ The period from 1812 to the early 1830s is the time span for the entire thesis, not individual issues. Therefore, if the pertinent discussion surrounding a particular issue peaked earlier on (for example, the issues of the National Bank and internal improvements) the dates of works examined regarding these particular issues may be dated substantially earlier than the early 1830s cut off point. The early 1830s were chosen as a general endpoint, so that the discussion could remain focused by reflecting the years during which the majority of debate regarding these issues was occurring.

Calhoun's works over time allowed for the scrutiny of the similarities and differences in Calhoun's position and helped locate them in the broader sweep of issues and events in United States politics. Also, the timeline format highlighted the nature of Calhoun's shift in position. For example, the following questions became apparent early on in the research when examining Calhoun's work from this perspective: (1) was there a clustering of change in Calhoun's opinions on major issues at one particular time; or (2) were changes scattered throughout?

The nationalism of early and mid-1800s America was directed "toward the problems and challenges of internal development."² Major issues that touched upon the nationalism/states' rights controversy during this period were internal improvements such as roads, canals, and steamboats and economic development such as protective tariffs. Essentially, examining policy issues and legislation on those issues served as a way to identify public controversies that highlighted the nationalism/states' rights discussion during this period. The documented debate over these various controversies acted as markers along the timeline; that is, by following the development of these issues, I was able to track the individual controversies, as well as Calhoun's written responses to these issues. As a result, it was possible to identify some of the possible coincidences between Calhoun's change in position and other factors; for example, whether or not a change in Calhoun's position on a particular issue appeared to be more politically, socially or economically driven.

Furthermore, the timeline format allowed certain issues to be highlighted that illustrated the emergence of nationalism and the ensuing sectionalism in later years. Examining these issues, and comparing them to issues on which Calhoun's views remained static, allowed me to speculate about how and why these events or issues were distinct from others in Calhoun's mind. These comparisons revealed some of the possible motives for change or for stability that subsequent chapters will discuss.

² Dangerfield, George, The Awakening of American Nationalism. Harper & Row, New York: 1965, p. 195.

Sources of Evidence

In order to address the research question, it was necessary to first carefully gather materials that related to the questions being examined. I explored relevant publications regarding the issue of “nationalism in the United States,” which allowed me to first become educated on the issue of nationalism more generally.³ Through this literature review, I was able to select the National Bank, internal improvements, and protective tariffs as pertinent issues in the growth of nationalism and “hot topics” of debate among nationalists and sectionalists, as they were identified as areas of weakness during the War of 1812. As well, these three topics, especially the latter two, were common issues in Calhoun's writings. In addition, an extensive review of John C. Calhoun’s writings further enhanced my knowledge of the subject, allowing for a comprehensive yet focused discussion of both the overall political currents of his time and Calhoun’s own political agenda.

This literature review emphasized Calhoun’s own writings as well as historical works that identified major issues, legislation on these issues and some interpretations of Calhoun’s writings by political scientists and historians. Although sources were not strictly limited to these categories, the majority fell within these confines. After the preliminary literature review, the following general criteria were used to determine whether a source was to be included. Sources had to be either: (1) directly related to Calhoun’s position on an included issue; or (2) document a major issue that illustrated the struggle in federal-state relations.

Among Calhoun’s early works that were examined were his floor speeches in the United States House of Representatives and those during his term as the Secretary of War. Speeches included those on the Bonus Bill (1817), and in his support of the Tariff of 1816. Later works included Calhoun’s speeches on the floor of the Senate, public letters, and other documents. Among these are the South Carolina Exposition and Protest (1828), Calhoun’s Address on the Relations of the States and Federal Government (1831), and his

³ Initially, to identify sources, I relied on library searches, using keywords like "Calhoun and Nationalism." After identifying preliminary sources, I used notes within these sources to identify additional texts.

Report for the Committee on Federal-State Relations of the Legislature of South Carolina (1831.) Some of the specific legislation examined included: Calhoun's Bonus Bill (1817), the General Survey Bill (1824), the Cumberland Road Bill (1822), the Maysville Road Bill and the Tariffs of 1816, 1820, 1824, 1828, 1832.

The literature review aided in identifying pertinent words and phrases that helped determine whether a source was relevant. The selected sources sought to identify "coherent and important examples, themes, and patterns in the data."⁴ To ensure that a source was relevant to the questions being addressed, each source was carefully read, with special attention paid to words and phrases such as federalism, nationalism, states' rights and federal-state relations. Other important phrases included internal improvements, economic development, industrial growth, tariffs, roads, canals and steamboats. Also noted, particularly in the examination of Calhoun's works, were references to the major issues of the National Bank, internal improvements, and protective tariffs. By gathering as much information as possible, and narrowing down sources through the above criteria, pictures of the national political currents as well as of Calhoun's positions were created. Moreover, the systematic literature review allowed the research and subsequent discussion to remain inclusive, yet directed.

Limitations

While careful consideration was given to source selection and a conscious effort was made to identify and eliminate any sources that might potentially bias the analysis, certain limitations were apparent during the research process. First, although I strove for objectivity, subjectivity is inherent in any research project. As Patton notes, "The possibility of attaining objectivity and truth in any absolute sense has become an untenable position in evaluation."⁵ However, while bias may be inherent, I made a conscious effort to note any such bias and to remain as neutral as possible in all decisions; that is, I

⁴ Patton, Michael, How to Use Qualitative Methods in Evaluation. Sage Publications: London, 1997, p. 149.

⁵Ibid.

sought out only balanced and relevant information for the project, seeking to take into account multiple perspectives, multiple interests, and multiple possibilities.⁶

Second, the study was limited by the sheer breadth of information available on the topic. I was faced with the decision of just how much description was necessary for the reader to fully understand the issues discussed. As Patton notes, in-depth quotations and detailed description are essential to any research project. He points out, however, that description need not be either trivial or mundane, suggesting that the reader may be informed without knowing absolutely everything said or done.⁷ Analysis and interpretation balance description.⁸ Therefore, I attempted to keep the research project focused yet informed by including sufficient description for the reader to comprehend the analysis.

While other pertinent topics, in particular slavery, were relevant to Calhoun's writings, and, possibly, his change in position, the thesis does not address them, in-depth. Rather, it focuses on the three areas of the National Bank, internal improvements, and protective tariffs because they are narrow enough to effectively track over time and to identify any possible relationships, as opposed to slavery, which was a broad issue that encompassed many factors that might have been more difficult to trace. However, there are limitations in using these three issues to track Calhoun's position over time. It is also worth noting that during this time period none of these issues was separate from the others for from slavery. Therefore, any conclusions regarding Calhoun's shift in position must acknowledge these limitations and be limited only to the issues discussed.

Finally, the project was limited by certain characteristics distinctive to historical analysis. Primarily, depending on the time period during which a secondary source was written or a primary source was written or examined, the interpretation of the material or its availability or accuracy can vary tremendously. Because I utilized a variety of secondary sources with publication dates ranging from the early twentieth century to the present, I consciously took possible historical biases into account. To counteract any potential bias, I

⁶Ibid, p. 167.

⁷Ibid, p. 163.

⁸ Ibid.

sought to find consistencies among all works examined, and eliminate sources that contained blatant inconsistencies when compared to similar publications.