



MISSIOLOGICAL RESEARCH

Interdisciplinary Foundations,
Methods, and Integration

Marvin Gilbert, Alan R. Johnson, and Paul W. Lewis
EDITORS

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CASE STUDIES

Alan R. Johnson, PhD

COMPARING CASE STUDY AND ETHNOGRAPHY

Ethnography, case study, narrative analysis, phenomenology, and action research are all qualitative research frameworks. While sharing common methods of data collection, these five approaches are “distinguishable according to individual characteristics” (Court 2003). In the context of teaching and mentoring graduate students, Deborah Court noted that the most difficult distinction to make among these five methodologies is that between ethnography and case study. This challenge is compounded by the fact that some social science journals use the terms interchangeably (2003).

The following table summarizes important characteristics of both ethnography and case study. Juxtaposed, the information in this table highlights the distinctions between these methodologies.¹

Ethnography	Case Study
The goal is to obtain all the knowledge necessary for a complete stranger to masquerade as a participant, only on the basis of the information obtained from the ethnographer.	Outward looking and, based on intensive study of a case, aims to contribute to our understanding of a phenomenon.
Ethnography describes the behaviors, values, beliefs, and practices of the participants in a given cultural setting.	Studying a particular case yields a detailed understanding of that one case, shedding light on the wider phenomenon of which that case is an example.
Analyzing a culture means not simply recounting behaviors and events, but inferring the cultural roles that guide behaviors and events.	A case is an intensive study of the “individual”: the individual can be defined as a group, a society, an institution, an incident, or even one person.

1. Information presented in this table is based on Court (2003).

Ethnography	Case Study
The intention of ethnography is to capture the everyday events, the unwritten laws, and the social conventions and customs that govern the behavior of persons and sub-groups within a culture.	A case is (1) a source of ideas and hypotheses, (2) a resource for new interventions, (3) a way to study rare phenomena or offer a counter-instance to a widely accepted notion, and (4) a mechanism with persuasive and motivational value.
Ethnography seeks to uncover tacit knowledge of participants in the specific culture under study, and is most likely to emphasize interpersonal interaction.	The case study examines a limited number of events or conditions and their interrelationships in a shared context.

DEFINING A CASE

As implied in the preceding table, the key to distinguishing between ethnography and case study lies in the definition of a case. The literature consistently identifies a case as one specific entity (“individual”) of something or a class of things: an event, an organizational unit, a person, a phenomenon, a site, or a program.²

Robert Stake noted that a case should be a specific, complex, functioning thing (1995, 2). He offered some helpful examples of what could be a case and what would never be considered a case. These examples are summarized in the following table.

Could Be Studied as a Case	Would Never Be Labeled a Case
A child	Why children act a certain way
A teacher	A given teacher’s teaching (it lacks specificity and boundedness)
An innovative program	The reasons for innovative policies or teaching (these are generalities not specifics)
All the primary schools in a given city	The relationship among schools

SETTING THE CASE BOUNDARIES

Setting the boundaries of a case is a challenging task; it constitutes a key step in case study methodology. The boundaries drawn around a problem,

2. E.g., Baxter 2008, 546; Knight 2002, 41; Mill, Durepos, and Wiebe 2010, xxxii.

in order to conceptualize and define it, are fundamental to the findings. As Peter Knight (2004) succinctly observed, “Change the bounds of the case and you are likely to be changing the research findings” (41). Boundaries can be set in one of three ways: by time and place, by time and activity, or by definition and context.³

IMPLEMENTING A CASE STUDY

A case study design should be considered for any of four conditions (Baxter 2008, 546):

1. The focus of the study is to answer “how” and “why” questions.
2. The researcher cannot manipulate (empirically) the behavior of those involved in the study.
3. The researcher wants to cover contextual conditions, believing they are relevant to the phenomenon under study.
4. The boundaries between the phenomenon and context are not clear.

After selecting a specific case, the researcher’s focus shifts to (1) the interrelationships that constitute the context of a specific entity, and (2) analysis of the relationship between the contextual factors. All of this activity is centered on the goal of generating new theory or contributing to existing theory (Mill, Durepos, and Wiebe 2010).

After determining the case and setting its boundaries, the researcher should choose the type of case study that best fits the research objectives. Writers have used a variety of terms to describe the types of case studies that are possible. These include exploratory, explanatory, descriptive, single-case, multiple-case, holistic, instrumental, intrinsic, and collective. Baxter and Jack summarized well the distinctions between the various types of case studies (2008, 547).

A researcher implements a case study by developing propositions that will focus the data collection. Case study data may be generated from a variety of sources: the literature, personal experience, existing theories, and generalizations based on empirical research (Baxter and Jack 2008, 551). Pamela Baxter and Susan Jack recommended that case-study researchers

3. See Baxter (2008, 547) for a discussion of boundary setting.

seek multiple data sources, since the convergence of those sources creates greater understanding of the case.

STRENGTHS AND WEAKNESSES OF CASE STUDIES

The following table is based primarily on material from Phil Hodgkinson and Heather Hodgkinson (2001) in their conference paper on the strengths and limitations of the case study method.

Strengths	Weaknesses
They help researchers understand complex inter-relationships.	They are inherently subjective.
They are grounded in lived-reality.	Generalization in the conventional sense is limited.
They can facilitate the exploration of the unusual and unexpected.	They have questionable reliability and validity.
Multiple case studies can enable research to focus on the significance of the idiosyncratic.	They do better at description than explanation and establishment of cause-effect relationships.
They can show the processes involved in causal relationships.	They may generate so much data that the researcher may struggle to analyze it all, despite clearly setting the case boundaries.
They can facilitate conceptual and theoretical development.	They are quite costly if attempted on a large scale.
They produce more detailed information than possible through statistical data analysis.	It is hard to represent the complexity of the case in a simple fashion.
They excel in addressing situations that are not homogeneous and routine, but rather involve creativity, innovation, and context.	It is difficult to represent the results numerically.
They allow for greater flexibility in exploring a subject.	They cannot answer a large number of relevant and appropriate research questions.
The emphasis on context places a more human face on research and can serve to bridge the gap between abstract research and concrete practice.	They are easily dismissed by policy-makers or managers because of their small sample size, potential for researcher bias, and lack of connection to many real-life settings.

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REFERENCES AND RESOURCES FOR ADDITIONAL READING

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WEBSITE OF INTEREST

Colorado State University, Writing @CSU. *Case Studies*.
<http://writing.colostate.edu/guides/research/casestudy/com4a1.cfm>

JOURNAL ARTICLE WITH ABSTRACT

Flyvbjerg, Bent. 2006. "Five Misunderstandings about Case-study Research." *Qualitative Inquiry* 12: 219–45. doi: 10.1177/1077800405284363.

This article examines five common misunderstandings about case-study research: (a) theoretical knowledge is more valuable than practical knowledge; (b) one cannot generalize from a single case, therefore, the single-case study cannot contribute to scientific development; (c) the case study is most useful for generating hypotheses, whereas other methods

are more suitable for hypotheses testing and theory building; (d) the case study contains a bias toward verification; and (e) it is often difficult to summarize specific case studies. This article explains and corrects these misunderstandings one by one and concludes with the Kuhnian insight that a scientific discipline without a large number of thoroughly executed case studies is a discipline without systematic production of exemplars, and a discipline without exemplars is an ineffective one. Social science may be strengthened by the execution of a greater number of good case studies.