

Introduction to Case Studies

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Key concepts, purposes, and practical steps for using case studies in research and teaching.

1. What Is a Case Study?

Aspect	Definition
General	An in-depth, contextual investigation of a bounded phenomenon (person, group, organization, event, or process).
Scope	Can be single-case (one instance) or multiple-case (comparative).
Nature	Qualitative-heavy, but may incorporate quantitative data (mixed-methods).
Boundaries	Defined by time, location, participants, and research questions.

2. Why Use Case Studies?

Purpose	Typical Applications
Exploratory	Identify variables, generate hypotheses (e.g., new technology adoption).
Descriptive	Provide a rich, detailed portrait (e.g., a startup's growth story).
Explanatory	Test causal mechanisms in real-world settings (e.g., why a policy succeeded).
Evaluative	Assess program implementation and outcomes (e.g., community health initiative).
Pedagogical	Illustrate theory-practice links for students (e.g., ethics dilemmas).

Advantages – depth of insight, contextual richness, flexibility, relevance to practice.

Limitations – limited generalizability, potential for researcher bias, time-intensive.

3. Core Components of a Case Study

1. Research Question(s)

- Must be clear, focused, and feasible.
- Example: “How does remote work affect team cohesion in software development firms?”

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2. Case Definition & Boundaries

- Identify the unit of analysis (individual, organization, event).
- Set temporal and spatial limits.

3. Theoretical Framework

- Guides data collection and analysis.
- Common frameworks: grounded theory, activity theory, institutional theory.

4. Data Sources (Triangulation)

- **Interviews** – semi-structured, oral histories.
- **Documents** – reports, policies, emails.
- **Observations** – field notes, video recordings.
- **Artifacts** – prototypes, designs, photographs.
- **Quantitative data** – surveys, performance metrics (if relevant).

5. Data Collection Procedures

- Develop protocols, consent forms, and ethical approvals.
- Maintain a **case log** to track contacts, dates, and reflections.

6. Analysis Strategies

- **Within-case analysis** – pattern identification, narrative construction.
- **Cross-case analysis** (for multiple cases) – clustering, similarity/difference mapping.
- Techniques: coding (open/axial/selective), thematic synthesis, process tracing, pattern matching.

7. Findings Presentation

- Narrative description + analytical commentary.
- Use of tables, timelines, and visual models to clarify complex relationships.

8. Validity & Reliability (Trustworthiness)

- **Credibility** – member checking, triangulation.
- **Transferability** – thick description.
- **Dependability** – audit trail, clear methodology.

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- **Confirmability** – reflexivity, researcher bias acknowledgment.
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4. Step-by-Step Guide to Conducting a Case Study

Step	Action	Tips
1. Define the Problem	Clarify the phenomenon and why it matters.	Link to theory or practical gap.
2. Select the Case(s)	Use purposive or theoretical sampling.	Ensure the case can answer the research question.