

# Handbook of Research Design & Social Measurement

## THE CASE STUDY

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## THE CASE STUDY

Although either the culture-sharing group or specific individuals within it might be considered a “case,” the case study approach to qualitative inquiry is focused less on discerning patterns of the group and more on an in-depth description of a process, a program, an event, or an activity. Some consider “the case” an object of study (Stake, 1995), and others consider it a methodology (e.g., Merriam, 1988). In either situation, case study is an exploration of a “bounded system” or a case (or multiple cases), over time, through detailed, in-depth data collection involving multiple sources of information and rich in context.

The case study approach is familiar to social scientists because of its popularity in psychology (Freud), medicine (case analysis of a problem), law (case law), or political science (case reports). Case study research has a long, distinguished history across many disciplines. Hamel (1993) traces the origin of modern social science case studies through anthropology and sociology. He cites anthropologist Malinowski's study of the Trobriand Islands, French sociologist LePlay's study of families, and the case studies of the University of Chicago Department of Sociology in the 1920s and 1930s (e.g., Thomas and Znaniecki's study, *The Polish Peasant in Europe and America* [1918-1920/1958]) as antecedents of qualitative case study research. Today, the case study writer has a large array of texts and approaches from which to choose to develop a case study. Yin (1989), for example, espouses both quantitative and qualitative approaches to case study development and discusses exploratory and descriptive qualitative case studies. Merriam (1998) advocates a general approach to qualitative case studies in the field of education. Hamel (1993), a sociologist, provides a historical and problem-centered discussion of qualitative case studies. Stake (1995) systematically establishes procedures for case study research and cites them extensively in his example of “Harper School.”

## 4.8.1 Variants

Case studies may be selected because they are unusual and have merit in and of themselves. When the case itself is of interest, it is called an intrinsic case. The study of a bilingual school illustrates this form of a case study (Stake, 2000). Alternatively, the focus of a qualitative study may be on a specific issue, with a case used to illustrate the issue. This type of case is considered to be an instrumental case, because it serves a purpose of illustrating a particular issue. The case study by Asmussen and Creswell (1995) portrays an instrumental case of a campus used to portray reactions to a gunman incident.

Case studies may also include multiple cases; this type is called a collective case study (Stake, 1995). Multiple cases are described and compared to provide insight into an issue. Several schools, for example, might be studied to illustrate alternative approaches to school choice for students. Finally, case study researchers may select several cases (a collective case study), with multiple cases illustrating [p. 163 ↓ ] a specific issue. When several cases are studied, the researcher selects the cases purposefully to illustrate typical examples of cases or representative cases. Although qualitative researchers do not intend to generalize findings, researchers using a multiple or collective case study often make claims about generalization. When this is done, the inquirer needs to select representative cases for inclusion in the qualitative study.

## 4.8.2 Key Elements of a Case Study

A case in a case study is a bounded system, bounded by time and place, and the case may be a program, an event, an activity, or individuals. For example, the researcher might select for study several programs (a multi-site study) or a single program (within-site study). The “case” may be a single individual, several individuals separately or in a group, a program, events, or activities (e.g., a teacher, several teachers, the implementation of a new math program). The “case” may represent a process consisting of a series of steps (e.g., a college curriculum process) that form a sequence of activities. To learn about these systems, researchers collect multiple sources of

information including observations, interviews, audiovisual material, and documents and reports. The researcher seeks to develop an “in-depth” understanding of the case(s) through collecting multiple forms of data (e.g., pictures, scrapbooks, videotapes, and e-mails).

Providing this in-depth understanding requires studying only a few cases, because for each additional case examined, the researcher has less time to devote to exploring the depths of any one case. Setting the context of the case involves situating the case within its setting, which may be a physical setting or the social, historical, and economic situation. The researcher also locates the “case” or “cases” within their larger context, such as geographical, political, social, or economic settings (e.g., the family constellation consisting of grandparents, siblings, and “adopted” family members).

## 4.8.3 Procedures for Conducting a Case Study

Several procedures are available for conducting case studies (see Merriam, 1998; Stake, 1995). This discussion will rely primarily on Stake's (1995) approach to conducting a single or multiple case study.

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