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CASE STUDY RESEARCH

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In this chapter, I provide an introduction to case study design. The chapter begins with a definition of case study research and a description of its origins and philosophical underpinnings. I share discipline-specific applications of case study methods and describe the appropriate research questions addressed by case studies. I follow this description with methods considerations, including case study design, research questions, sample size, data collection, and data analysis. Note that there are many approaches and styles to case study research. This chapter focuses primarily on case studies that rely on qualitative methods; more advanced readings are listed at the end under Key Resources.

BACKGROUND

Case study research involves a detailed and intensive analysis of a particular event, situation, organization, or social unit. Typically, a case has a defined space and time frame: “a phenomenon of some sort in a bounded context” (Miles, Huberman, & Saldaña, 2014, p. 28). In terms of scope, a case study is an in-depth investigation of a contemporary phenomenon within its real-life context. The case study is appropriate especially if the context is relevant to the phenomenon—for example, investigating an achievement gap in a high school (the phenomenon) with a large second-generation immigrant population (the context). Because the boundaries between a phenomenon and its context are not always clear, case study design relies on multiple data sources for evidence (Yin, 2018, p. 15).

A *case* could be an individual, a role, a small group, an organization, a community, or even a nation (Miles et al., 2014, p. 28). Examples include the following:

- A remote town affected by a natural disaster, such as an earthquake (see Parrinello, 2013); the town or area constitutes the case.
- A refugee group resulting from a political conflict (Pedersen, 2012); the group is the case.
- A president or a high school principal. For example, Scribner and Crow (2012) reported on the case study of a high school principal in a reform setting.

Case studies are best conceptualized by the bounded phenomena of interest and not by specific methods; thus, different studies can be conducted under this broad umbrella. For example, two

well-known case studies include Sigmund Freud's (1905) study of Dora and Graham Allison's (1971) case study of the Cuban missile crisis. Freud's case study of Dora used recollections, reconstruction, and dream analysis to depict a young woman suffering from hysterical symptoms, including difficulty breathing, nervous coughing, and headaches. Freud demonstrated that even an ordinary case can have an application in similar situations. The case study of the Cuban missile crisis is based on a broad range of data ranging from government documents to interviews with numerous officials. The results have served to instruct others about leadership styles and processes, in difficult situations. The Cuban missile crisis case study also clearly demonstrates how a case study is used for explanatory purposes and not just descriptive or exploratory purposes (Yin, 2018, p. 7).

Case study research typically fits in the postpositivist paradigm, which implies the existence of an ultimate reality that we can only approximately—not completely—understand. VanWynsberghe and Khan (2007) also suggest the possibility of critical theory and interpretivist paradigms for case study research, suggesting that “case study can make a substantial connection to each” (pp. 89–90).

Benefits of Using a Case Study Approach

Case study research offers benefits in terms of process and outcome. The case study design will help you focus your research within the confines of space and time on a specific case. A case study also gives you an opportunity to collect different kinds of data, such as interviews, documents, observations, surveys, and others, about the case and provides you with the chance to get an in-depth look at an organization or individual and the inner workings and interactions of that organization or individual.

In terms of the outcome, the case study provides a comprehensive understanding of a bounded unit and helps the reader examine that case so he or she can learn from it. It also allows others to apply the principles and lessons learned in a case to other cases or situations and leads to transferability (i.e., the ability to apply the case to another situation), which is different from the generalization that occurs in quantitative studies. For example, if someone wanted to learn more about being a high school principal, a case study could help that person learn about that experience and apply it to another situation or help that person decide whether being a principal is his or her best career path.

Focusing Case Study Research

Case study research focuses on a specific event, person, place, thing, organization, or unit (or if more than one, typically a small number). The key is to identify the case and the boundaries of that case; the question to ask is, “What is the *case*?” You can help yourself answer that by answering the question, “What is part of, and what is not part of, the case?” what Yin (2018) refers to as “bounding the case” (p. 31). Merriam (1998) writes, “I can ‘fence in’ what I am going to study” (p. 27). If the case is one school, then other schools are not part of the case; if the case is the principal,

DISCIPLINE-SPECIFIC APPLICATIONS OF CASE STUDY

Case study research is used widely across disciplines; this type of research is most common in education and other social sciences, as well as in law, political science, and health care. For example:

In this discipline . . . a case study could investigate . . .

Health care	A hospital or specific type of patient
Education	A school or a principal
Business	A business, a chief executive officer (CEO), or a start-up organization
Public policy	A natural disaster and policy implications for responding to it

other teachers or administrators are not part of the case. Therefore, the specific unit of study, or unit of analysis, is a defining characteristic of a case study. Stake (2000) provides this perspective: “Case study is not a methodological choice but a choice of what is to be studied. . . . We concentrate, at least for the time being, on the case” (p. 435). Take care when defining the case because the research questions reflect the boundaries and definition of the case.

Examples of Case Study Research

These examples will be used throughout the rest of this chapter to provide examples of key elements of case study research. Note that each has clear boundaries of place and time, which is a defining characteristic of case studies.

- Militello, Schweid, and Sireci (2010) conducted a multiple-case study to explore the use of formative assessment systems (processes that students and teachers use to adjust their learning and teaching strategies). The authors wanted to better understand how educators seek and obtain assessment tools. The study lasted 18 months, used a sample of three school districts (representing a *multiple-case* study), and focused on the following overarching question: “To what extent does the fit between intended use and system characteristics foster or inhibit the ultimate utility of formative assessment systems for schools?” (p. 34). The results were focused on three key findings: (1) the reasons a school district might want an assessment system, (2) characteristics of the assessment systems, and (3) how formative assessment systems are used (p. 36).
- Joia (2002) conducted a single explanatory case study, analyzing the use of a web-based virtual learning environment for business students in Brazil. Although this is considered a single-case study (the case is the learning environment), three different cities (sites) were used for data collection. Five research questions were used, focusing on the collaborative nature of

virtual learning environments, the influence of the physical location of students, use of a moderator, and the students' perceptions of a particular learning environment used in the school. Results were organized around each of the research questions, including the conclusion that there was collaborative learning in place, but the particular platform did not support the accomplishment of collaborative work.

- Scheib (2003) used a collective case study design to examine role of stress among four music teachers at a high school in the Midwestern United States. This study elaborated on previous literature that examined specific stressors in a music teacher's life to learn more about why those stressors exist. Scheib used observations, individual interviews, and document analysis to understand stressors related to areas such as role conflict, role overload, and resource inadequacy. Scheib noted the essential nature of triangulation in balancing all aspects of the data that were collected.

Conducting Case Study Research

The case study design includes components that connect initial research thoughts to the final research conclusions. Those first research thoughts begin with a research problem, which involves the identification of a lack of knowledge about some issue or phenomenon. Identification of the problem then leads to crafting the purpose statement and research question(s). Examining the research question(s) then allows you to determine whether a case study is the appropriate design.

Characteristics for selecting case study research versus other approaches focus on *how* or *why* kinds of research questions directed at exploring and understanding some phenomenon in depth (Yin, 2018). Once the decision is made to conduct a case study, a key decision involves selecting the case itself. Yin (2018) noted the two required elements as “defining the case and bounding the case” (p. 30). The former relates to clearly and concretely indicating the case, which can be a person, place, thing, organization, or phenomenon. The latter relates to scope—what is, and is not, included in the case, whether from time, structure, or other perspectives. Once the case has been identified, you can determine the types of data needed and how those data will be collected.

Case Study Sample Size

Typically, a case study has a sample of one (i.e., the bounded case, but note that sampling can also occur within the case), unless the research project is a multiple-case study. In a multiple-case study, having three to four distinct cases for comparison is probably the most cases that one can realistically handle. When using multiple cases or sampling within a case, it is effective to use a selection method known as *purposeful sampling*. By selecting the cases, and the individuals, documents, and artifacts within the case, purposeful sampling allows you to focus in depth on a phenomenon. It allows you to explore information-rich cases from which you can learn a great deal about issues of central importance to the research (Patton, 2002, p. 46).

One way to understand purposeful sampling used for case studies is to contrast it to sampling for quantitative research. Samples obtained for quantitative research studies are often probability samples that are presumed to be representative of the population being studied and are used to generalize to that population; it does not matter who the individuals in the sample are—only that they are statistically representative of the larger population. In purposeful sampling, however, the goal is to find individuals or cases that provide insights into the specific situation under study, regardless of the general population.

Case Study Sample Selection

Sample sizes in case studies are typically small, which is common in most qualitative research. Sometimes the selection of samples and cases to use is straightforward and clear, due to the uniqueness of the person or organization or because of special arrangements or access to the case. In some situations, however, there may be many qualified case study candidates, and you may have to use a screening procedure to select the proper ones. Yin (2018) suggests asking knowledgeable people about the case candidates or collecting limited documentation on them. What you clearly want to avoid is selecting a case that is representative of something other than what you want to study.

Joia's (2002) work is an example of a single-case study of a virtual learning community in Brazil. This particular case comprised 43 students enrolled in a graduate course on e-commerce. Scheib (2003), in his collective case study about the role of stress on high school music teachers, first selected the site based on the fact that he had access to it, that it had well-established music programs, and that the music department offered band, choir, and orchestra—a variety of musical programs. After selecting the site, the researcher focused on the four music teachers who taught there; the four teachers constituted the sample.

In other instances, screening for a sample can often be more involved. For example, Militello et al. (2010) used a sample of three schools from three different school districts in their research on formative assessment. They chose the schools by identifying prominent formative assessment companies and the districts that had contracts with these companies. After consulting with the state Department of Education to discover which districts were using assessment in a significant way (p. 34), the researchers narrowed their selection based on the use of formative assessments in middle school mathematics. The researchers then selected three school districts based on phone interviews with assessment personnel from the state Department of Education.

Case Study Research Questions

Research questions for a case study can be both quantitative and qualitative but frequently use terms similar to other qualitative research designs. For example, these kinds of questions focus on concepts such as *explain*, *explore*, *describe*, and *understand*. Typically, case study research questions use words such as *how* or *why*. Overall, the case study research questions need to address the substance of what (case) the study is about (Hatch, 2002, p. 10).

To formulate your case study research questions, think of conducting a case study like painting a picture. What does the case look like, whether it is an individual, organization, or situation? What image will the reader have in his or her mind after reading the case study? To paint that picture, what kinds of research questions would you need to ask?

Some case studies have one or two broad research questions. For example, Scheib's (2003) collective case study of school music teachers explored, through the lens of role theory, the open-ended question of why their work life is stressful. In another example, Campbell and Ahrens (1998) published a case study on rape victim services and set out to answer how and why coordinated service programs are effective. Other case studies state more specific questions. For example, Joia's (2002) case study on a virtual learning community had five specific questions, including "Why is a moderator needed, and how can his importance be measured?" (p. 309).

Some use an overarching question followed by subquestions, such as these from Militello et al.'s (2010) work. The main research question was, "To what extent does the fit between intended use and system characteristics foster or inhibit the ultimate utility of formative assessment systems for schools?" The subquestions were as follows:

1. Intended Use: What data and action did each district want from the assessment system?
2. System Characteristics: What were each of the formative assessment systems designed to do?
3. Actual Use: How are school district educators using the assessment systems? (p. 34)

Note that there is an important difference between the research questions for the case study and the interview questions used to elicit information from participants. Research questions are broad and focused on what the researcher ultimately wants to learn and not directed at any one person, document, situation, or occurrence within the case. Rather, the questions are directed at the case as a whole, and answers to the research questions will be derived from all the sources of data. Ask participants interview questions that will help you answer your research questions. Interview questions are directed at individuals or groups within the case and often contain the word *you*. For example, the questions might start with, "How do you . . .?" or "Why do you . . .?" As a hint, if the word *you* appears in a research question, it is probably an interview question, and not broad enough to be a research question.

DATA COLLECTION PROCEDURES

Types of Data Collection

In case studies, the research questions drive the data to be collected. From the research questions, the researcher determines the kinds of questions to be asked in interviews, what to observe, what documents to review, and what artifacts to examine. Therefore, multiple sources of data are used in a case study. Sources of evidence

may include one or more of the following: (a) documentation, (b) archival records, (c) interviews, (d) direct observation, (e) participant observation, and (f) physical artifacts (Yin, 2018, p. 114). Stake (1995) supports the guidance provided by the research questions, noting, “What one does in the field, from gaining access to triangulating data, needs to be guided by the research questions” (p. 50).

If you use survey instruments for data collection, they need to be valid and reliable. For interviews, you will need interview protocols, or a list of questions and prompts used to interview participants. Protocols are useful to ensure the consistency of the interviews across the individuals being interviewed. You may also use different interview protocols for different groups within the case. For example, you might use different interview protocols for teachers and for students. Observations also require protocols; they ensure that interviewers understand what they are looking for and how the observations will help answer your research question(s). Similarly, be sure you know how documents and physical artifacts will help answer the research questions; know, in advance, what you are looking for. Yin (2018, pp. 126–137) also advocates the following general principles of data collection in case study research.

Table 16.1 provides important elements associated with data collection in case study research.

TABLE 16.1 ■ KEY ELEMENTS OF DATA COLLECTION IN CASE STUDY

Principle	Explanation
1. Use multiple sources and over several time periods.	Use different types of data and obtain different perspectives by using a variety of people and other sources. Scheib (2003) used direct observations of, and interviews with, the music teachers, school policy publications; documents sent to students and parents and music concert programs. Campbell and Ahrens (1998) included interviews with rape victim advocates, crisis center directors, police, prosecutors, and medical staff, as well as the rape survivors themselves; pamphlets and training manuals were made for each community program. Militello et al. (2010) collected data in three stages during one school year.
2. Build a case study database.	Keep your notes, documents, narratives, and other materials organized by maintaining a physical or electronic file system. This can include field notes, documents, surveys or other quantitative data, and other narratives. Consider using software to help you stay organized.
3. Establish a chain of evidence.	Be sure you are able to track the final conclusions backward through your notes or database to your approach, protocols, and research questions. Ask yourself, “Can I do a backward line of sight from my report all the way through to the research questions?” “Is there alignment between the conclusions, the evidence, and the research questions?”
4. Exercise care when using electronic sources.	The sheer volume of information available electronically can be overwhelming, so it is important to set limits on the amount of time you will spend collecting these kinds of data. Ensure you can make a strong case for relevance of this information to your research purpose. Also, the ease of posting and accessing data electronically requires caution regarding the credibility and accuracy of such data. Cross-check and double-check references and sources. Always seek permission to use electronic sources; just because information is on the internet does not mean it is in the public domain.

Stake (1995) also notes that data gathering almost always involves someone else's "home grounds," and thus "a small invasion of personal privacy" (p. 57). Be sure to obtain the required permissions, typically done as part of informed consent and institutional review board approval, including how the final report will be used or distributed.

Data Analysis Techniques

There is wide variation in case study research, but most scholar-practitioners tend to focus on qualitative data, which is where the focus of this section will be. Advice from Patton (2002) is well worth heeding: "The best advice I ever received about coding was to read the data I collected over and over and over. The more I interacted with the data, the more patterns and categories began to 'jump out' at me" (p. 446). Data, or content, analysis involves several phases: describing, interpreting, drawing conclusions, and determining significance. Specific techniques will vary based on the type of study and its purpose, and individual researchers will often develop their own approach and style. Typically, case study data analysis will involve the following steps.

Describing. This involves understanding the "who, what, when, where" of the situation under study. The descriptive phase of the data analysis involves several readings and reviews of all data collected. Field notes—those taken while at the research site or while studying parts of the case—are reviewed extensively to discover patterns or themes. Patterns tend to be descriptive, such as "most students are excited about the first day of class," whereas themes are often more topical, such as "excitement about school."

Emergence of Findings. Through the researcher's interaction with and immersion in the raw data, findings in the form of patterns, themes, or categories emerge, which is the essence of the inductive form of qualitative data analysis. The initial stages of this analysis involve open coding, which emphasizes recognizing any patterns that emerge from the data rather than analyzing data based on an existing framework as one might do in deductive analysis with quantitative data. These codes summarize and put labels on patterns, themes, or categories observed in the data.

Codes become brief shorthand labels to passages of data for easier organization and recognition. Coding is essential when multiple researchers are working on the same project to ensure common understanding and consistency. Codes can be identified in advance of the data analysis, which is known as *a priori coding*, based on what the researcher anticipates seeing in the data, or codes can be allowed to emerge from the data, either from the information itself or from the individuals interviewed. The latter is often called *in vivo coding*. Codes may also arise from a theoretical framework (hence the need for your research to be grounded in the literature). An accompanying step to open coding is axial coding, where relationships or connections are identified among the initial categories and themes identified during open coding.

Although researchers often think of open and axial coding as separate and sequential steps, Corbin and Strauss (2008) noted that "open coding and axial coding go hand in hand" (p. 198). Combining open and axial coding becomes a process of concurrently

dissecting the raw data and reassembling it at the same time. While involved in this dissection/reassembly, you may find yourself comparing each piece of data with the ones that came before it; this *constant comparative analysis* is a common approach in many types of qualitative research. Selective coding is a final step in the coding process that allows you to create larger categories that connect the previously identified categories. Creswell (2007) referred to this as creating a “story line” (p. 67). One final thought on coding: It is helpful to maintain a description or definition of your codes, often in visual form, to allow for easy identification and revision later.

Cox (2011), in his doctoral dissertation, described some of his coding process:

During initial coding, digital transcripts were hand-coded to establish patterns in the data and to identify the initial codes. . . . After the first five participant interviews and transcriptions, data were hand coded on the transcripts, analyzed, and preliminarily organized in the structure of an NVivo tree and case nodes. (p. 124)

Cox (2011) further explained that primary codes appear in bold and that “secondary codes, unbolded, appear to fit within the scope of primary codes” (p. 254, see Table 16.2).

Comparing. Final steps in case study data analysis can include making comparisons across the various themes that have emerged from the data, as well as making comparisons across different cases, if the study was a multiple-case study design. It is important to understand that these steps may not necessarily happen linearly, but in an iterative way. You may be comparing themes as you identify them. You may even need to go back and collect more data after completing these steps. Collecting new data to better conceptualize themes is common in qualitative research.

Examples of Data Analysis

- Joia (2002) used tables and charts to describe behavior and usage in the virtual community and the geographic distribution of its students in terms of participation. In addition, Joia analyzed the typology of the web-based community according to a taxonomy established by previous research.
- Lotzkar and Bottorff (2001) analyzed videotaped data in four steps. First, they reviewed the videotaped data to identify and describe behaviors of interest. Second, they reviewed the tapes to identify clusters of behaviors indicating the development of the relationship. Third, they described patterns of behavior within each cluster and compared the clusters, and finally, they constructed a detailed behavioral description, including conditions, cause or function, and consequences of the observed behaviors.
- Scheib (2003) used coding techniques to analyze interview transcripts, field notes, and documents. The researcher used codes identified by previous researchers to identify specific role stressors (e.g., role conflict, role ambiguity, role overload) in the artifacts.

- Militello et al. (2010) analyzed data using coding and comparative analysis (p. 36). The research team created memos from field notes and artifacts. They exported the memos, along with their interview transcriptions, into a computer database, and they described them using an open coding system. They applied codes to represent themes identified in existing literature and also to represent unreported findings. Using a similar coding system, they also analyzed the technical data. Then, they compared the data to analyze

TABLE 16.2 AN EXAMPLE OF THE INITIAL STAGES OF THE CODING PROCESS

Participant	1	2	3	4	5
Initial Codes	Values	Motivations	Tradition	Challenge	Goals
	Service	Teamsmanship	Expectation	Growth	Standards
	Socialization	Adventure	Symbolism of uniform	Adventure	Ethics
	Leadership as shaping	Direction	Value	Overcoming limits	Motivations
	Responsibility as shaping	Resilience	Integrity	Defining moments	Culture shock
	Culture shock	Agility	Proving self	Continuous learning	Growth
	Power of opportunity	Self-reliance	Growth	Ethics, values	Transformation
	Overcoming limits	Learning from leaders	Drive	Transformation	Risk taking
	Self-confidence	Integrity	Family	Politics vs. values	Learning
	Changed world view	Respect	Responsibility	Symbolism of rank	Self-worth
			Discipline	Definition of self	Values
			Identity	Calling	Leadership
			Change	Tradition	Civic duty
			Learning	Right thing	Role models
			Civic behavior		Selflessness
			Transformation		Belonging
			Sacrifice		Appreciation for country
					Tolerance
					Tested by experience
					Self confidence
					Judgment
					Mission

Source: Table reprinted with permission from Cox, R. (2011). The effects of military experience on civic consciousness (Doctoral dissertation).

Note: The primary codes appear in bold.

gaps between the intended and actualized use of formative assessments in the case study.

Case Study Reporting

The final step is case study reporting. Regardless of the purpose of your case study report—whether you are a student writing a thesis or dissertation or a researcher preparing an executive summary—be sure to do the following:

- Provide a thorough description of the case.
- Separate reporting from interpreting (reporting means presenting the facts: what happened, what did you see, etc.; interpreting involves finding meaning in the data).
- Include sections outlining your methods and your literature review, including how that literature led to your research questions.
- Ensure that the reader can easily follow the progression from your original problem, purpose, and methods to your analysis conclusions (there should be a clear sense of alignment among these items). Remember Yin's (2018) admonition to establish a chain of evidence.
- Make it clear what the case study informs and how it lays the groundwork for future studies.
- Write the report such that a person not involved in the case can understand it (limit the use of technical language so that a broader audience can learn from your experience).

Appropriateness of Case Study for Your Research Project

Embark on a case study as your research methodology when you want to better explore, understand, or explain “how” or “why” a phenomenon, within a particular context, is what it is. Case study research happens in the present, not the past; therefore, it explores a contemporary phenomenon. As a case study researcher, you will have little, if any, control over what happens in the phenomenon (as contrasted with controlled environments such as quantitative experiments); you will observe, review documents, conduct interviews, and collect other appropriate data in a manner that does not change behavior and minimally affects the phenomenon. You may collect quantitative data to help understand the “how” and “why,” but your purpose is not to understand effectiveness or cause but rather provide a description of the phenomenon to enhance overall understanding. As with all research, begin with a problem statement and research purpose, followed by research questions that focus on “how” and/or “why” to provide “an extensive and ‘in-depth’ description of some social phenomenon” (Yin, 2018, p. 4).

The Role of the Researcher in a Case Study

Typically, the researcher conducts interviews, administers surveys, reviews and analyzes documents, and observes whatever is being studied. In a case study, the

researcher is situated in the activity or organization being studied. In contrast, in quantitative research, the research may be done in a location other than where the object of study is located. For example, the researcher may not need to be present to conduct surveys. In qualitative research, the researcher is less separated from the object of study than in quantitative research.

As a researcher, be careful to avoid bias, or the tendency to prejudice or unduly influence the process or results of a research project. Be constantly aware of your own feelings, opinions, and prejudices, and make sure you are open to data and evidence that might not fit your notion or idea of what you might find. Do not enter into case study research, or any research, to demonstrate a previously held position or advocate a particular point of view. You can mitigate potential bias by using techniques shared by all qualitative research, such as journaling, triangulation of data, and member checking.

CONCLUSION

Case study research is an in-depth investigation of a contemporary phenomenon within its real-life context. A case study typically relies on multiple data sources and is bound by both space and time. Any discipline can use case study research, and case studies can be used with other research approaches; the key is to understand the “case” and ensure that the research questions support the case study design. Consistent with other qualitative designs, researchers need to attend to issues of researcher bias as well as quality in terms of trustworthiness (as discussed in Chapter 12).

Questions for Reflection

1. How does a clear definition of the “case”—that is, “bounding the case”—help with the management of the scope of the research?
2. Would you say that bias is more or less of a concern in case study research than in other types of research? How would you work to mitigate bias in case study research?
3. How does sample size affect the ability to effectively conduct case study research? How would a sample size of five or more make a case study much more difficult to do?
4. In speaking about data analysis techniques, Patton (2002) wrote, “I never even bothered to use the software program I installed on the computer because I found it much easier to code it by hand” (p. 446). Granted, that was written in 2002, and software has improved much since then. But even with that, what value do you see in simply reading the qualitative data several times rather than quickly entering it into a software program for analysis?
5. What limits our ability to generalize in case study research, which may include quantitative and qualitative approaches, in the same way that we generalize from designs that take a strictly quantitative research?

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