From question to inquiry: operationalising the case study for research in teaching

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From question to inquiry: operationalising the case study for research in teaching

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Case studies are widely used, particularly by researchers in education. While they are widely used, and have provided some of the most penetrating and challenging research in education and its practice, they may lack coherence and direction. A structure, is therefore, suggested for the operationalisation of case study research in teaching and in education more generally which involves consideration of the selection of case subjects, the choice of analytical focus and the varieties of form which the study itself may actually take. Using this structure, it is possible to give direction and coherence to the study while allowing its design to pursue any of a broad range of trajectories.

Keywords: case study; methodology; inquiry; reflective practice

Introduction

I have argued elsewhere (Thomas 2012) that education research is principally about teachers' own development and that such development depends on the kind of structured inquiry and reflection spoken about by Schön (1995) and others. In turn, this structured inquiry and reflection must take shape in the forms of problem-solving that are part of, and emerge from, teachers' practice and their business of everyday doing and being; that is, their work, their interactions with others, their reading and their discussions. They are characterised by revision and informal experiment, by the flexibility and changeability that hallmark local practice. They are characterised, in other words, by forms of local inquiry we normally call action research and case study. These latter are design frames that structure our research.

These are the 'deliberative pedagogies' spoken of by Cochran-Smith and Lytle (2006, 692). Using action research and case study, teachers can work together feedback from informal trials, ideas, propositions and speculations (meshing together practice and research) to cultivate and develop their professional work. Such cultivation and development occurs in a range of forms of professional development: it occurs in the continuous professional development characteristic of much contemporary post-experience and advanced education, and it occurs increasingly in the academic elements offered by universities to teachers in pre-service in the emerging teaching schools networks.

In this paper, I concentrate on one of the forms of inquiry that contributes substantially to such inquiry-based development, namely case study. The case study

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presents a view of inquiry that takes a pragmatic view of knowledge, one that elevates a view of life in its complexity. As Schön (1995, 28) has noted, the epistemology of the modern research university" is poor at looking at 'indeterminate zones of practice [in which] uncertainty, complexity, uniqueness [and] conflict' prevail. It is the recognition that the realities of these indeterminate zones of practice are indivisible that has led to case study's status as one of the most popular and most fertile design frames open to the teacher inquirer, and this is perhaps the reason behind its long-lasting popularity among researchers in education, often being used by teacher-researchers and teacher educators. The richness of the living worlds being studied in education is acknowledged and employed by the case study.

Although it is popular, particularly among student researchers and teacher-inquirers, sometimes what goes under the name 'case study' can amount to not much more than a weakly differentiated collection of thoughts and quotations from interviews with very little in the way of analytical binding (see Luker 2010, for a discussion). As the design of the case study is presented often as open-ended and untethered to any methodological frame, researchers (particularly those researching their own practice) may feel unguided about structure. The consequence is that the putative case study can therein lack purpose, integrity or analytical purchase on any theme.

What is case study in education?

It is difficult to define exactly what case study is. Perhaps Gerring (2004, 341) puts the problem best with this comment: 'Practitioners … have difficulty articulating what it is that they are doing, methodologically speaking. The case study survives in a curious methodological limbo'.

While social scientists from sociology, education and psychology have tended to see the case study in an interpretivist frame, those from business, politics and other areas may espouse the interpretivist holism of case study but address this through what George and Bennett (2005, 5) have called 'neopositivist' means via the identification of variables to be studied (see, e.g. the discussions of Yin 2009). By contrast, those in medicine and the law have tended to see the case study principally as a vehicle for exemplifying or illustrating novel or archetypal phenomena.

Though these differences in understanding exist, there are nevertheless strong commonalities about what case study constitutes across disciplinary boundaries. Reviewing a number of definitions of case study, Simons (2009) concludes that what unites them is a commitment to studying the complexity that is involved in real situations, and to defining case study other than by the methods of data collection that it employs. On the basis of these commonalities she offers this definition:

> Case study is an in-depth exploration from multiple perspectives of the complexity and uniqueness of a particular project, policy, institution, programme or system in a 'real life' context. (Simons 2009, 21)

The emphasis in Simons's definition is on depth of analysis. In it, one finds a 'trade-off', as Hammersley and Gomm (2000, 2) put it, between the rich, in-depth explanatory narrative emerging from a very restricted number of cases and the capacity for generalisation that a larger sample of a wider population can offer. It is important to add to Simons's definition the rider that case study should not be seen as a method

in and of itself. Rather, it is a design frame that may incorporate a number of methods. Stake ([2005](#), 443) puts it thus:

> Case study is not a methodological choice but a choice of what is to be studied … By whatever methods we choose to study *the case*. We could study it analytically or holistically, entirely by repeated measures or hermeneutically, organically or culturally, and by mixed methods – but we concentrate, at least for the time being, on the case.

Choice of method, then, does not define case study: analytical eclecticism in the in-depth study of a subject of interest is the key.

Alongside holism and methodological eclecticism, the case inquirer needs to carefully consider the nature of what is being studied, analytically speaking. For this reason, I offer an additional definition later in this article which focuses on the use and development of theory in case study research.

What value is case study in education inquiry?

Much of the discussion around case study research in education has concerned its value outside the situation of the study itself. What value can there be in case study if we are not able to generalise its findings more widely from the case itself? In answering this question, Stenhouse ([1978](#), [1980](#)) set case study in the context of a discussion of what research *is*, and what it *should be* and he concluded that case study is a basis for generalisation via the 'cumulation of data embedded in time'. He proceeded, in response to questions about the usefulness of case study, 'Practice will tend to improve when experience is systematically marshalled as history'.

For Stenhouse, then, it is about the building of knowledge, or theory, from the collation of different forms of case evidence. It is, in other words, the development of an archive of knowledge built from what Berger and Luckmann ([1979](#), 21) have famously called 'multiple realities'. We build exemplary knowledge, making connections between another's experience and our own, seeing links, having insights from the noticed connections. We create what Abbott ([1992](#)) calls 'colligations of occurrences'. In discussing the logic of this, Mitchell ([2006](#)) concludes that a good deal of the confusion about case study has arisen because of a failure to appreciate that the rationale of extrapolation from a statistical sample to a parent universe involves two very different and even unconnected inferential processes: (i) statistical inference and (ii) logical or scientific inference, the latter being about the confidence we may have that the logical connection among the features observed in the case relate also to the parent population.

Bassey ([1981](#), [1983](#)) notes that there are two modes of research in education, a search for generalities and a study of singularities. He goes on to pick up Simons's ([1996](#)) notion of the 'singularity' of the educational situation, that singular status implying everything within the boundary of what is under study. We should, Bassey suggests, actively encourage the descriptive and evaluative study of single pedagogic events.

In a highly detailed review, Smith ([1978](#)) seems in many ways to be in accord with Bassey, but to integrate the latter's arguments with those of Stenhouse and Mitchell. He emerges with interesting points about 'miniature theories' vs. 'general theories' and, importantly, 'educational rather than social science theory', asking

whether education has benefited from its 'stepsister' relationship with the 'big' social sciences.

I concur with this point about the problem of our stepsister relationship (Thomas 2011c). The study must be framed not in the diluted constructs of generalising natural science but rather in a kind of 'connective understanding' that comes from any consonance or dissonance which readers of the study may find with their own situations.

In practical terms, this leaves us with a view of case study focusing on local and key phenomena (Thomas 2012). Rather than seeking guidance for practice from bodies of theory or generalised knowledge, such study can offer a series of ways of proceeding based in exemplary knowledge. Through such exemplary knowledge, one can make connections between another's experience and one's own, seeing links, having insights.

Case study research has to be more than illustration

Across disciplines, case study is used as a means of illumination, inquiry and analysis. It is used in the sciences and in technology and it is, of course, a widely used method of instruction and research in medicine and the law. In fact, its origins, according to White (1992) and Garvin (2003), were in the professional training of lawyers at the Harvard Law School in the nineteenth century, but one can detect its use long before that for research rather than teaching. This can be evidenced in, for example, Jean Marc Gaspard Itard's (1962) study of Victor, the 'wild boy of Aveyron' at the beginning of that century or in Frédéric Le Play's celebrated studies of French working people in the middle of the century (see Mogey 1955). Though they did not think to call their approach 'case study', this is clearly what they were doing.

Its use, then, has been in both teaching and research and its widespread employment for both purposes recognises the value of the approach in taking a view of life in its complexity. It is the recognition of complexity that has led to case study's status as one of the most popular ways of looking at a subject in detail for the purposes of teaching and research. However, there is sometimes a lack of distinction made between the purposes to which the case study is being put. When that distinction is indeed blurred, there can be a tendency to take one kind of approach where another would have been preferable.

Taking the last point a little further, when the case study is used for purposes of research (rather than illustration or teaching), it is important that its users foreground the usual objective of research in finding something out. Research is not simply about illustration; it has to do more than this, as it will attempt to analyse, synthesise or theorise. Even if the aim is simple description, the description must be for a purpose, perhaps of explanation. Sometimes, though, the descriptive elements of 'case study' can be presented with very little in the way of analysis to hold the whole thing together or to give it purpose. Without direction, argument or conclusion, such work, valuable though it may be for the purposes of illustration, cannot be called research.

Conceiving of the study

Purpose

Assuming, then, that the principal purpose in doing case study research is, indeed, research rather than illustration, how can we think about this purpose? What varieties of purpose may there be? Stake (2005) uses the words *intrinsic* and *instrumental* to make a basic distinction between different kinds of purpose. In an intrinsic case study, the subject is being studied out of research interest, pure and simple. An instrumental study, by contrast, is being done with a secondary, perhaps practical purpose also in mind, such as evaluation. The researcher will be using the study as a tool.

Whatever the purpose, the aims of a study will centre on exploration and explanation. It is in the multi-faceted nature of case study, looking at the subject from many and varied angles, that researchers get the opportunity to relate one element to another and to offer explanations based on the inter-relationship of these elements. Foucault (1981) talked about seeking 'a polyhedron of intelligibility' or, in other words, looking at the subject from several directions to gain a more rounded, richer, more balanced picture of it.

Definition

I have already reviewed one or two definitions of case study. My own definition (Thomas 2011a) is as follows:

> Case studies are analyses of persons, events, decisions, periods, projects, policies, institutions or other systems which are studied holistically by one or more methods. The case that is the subject of the inquiry will be an instance of a class of phenomena that provides an analytical frame – an object – within which the study is conducted and which the case illuminates and explicates.

This definition introduces something new to those I reviewed earlier, namely the subject and the object, and I have taken these concepts from a number of commentators, notably Wieviorka (1992, 159). He made the point that when we talk about a case *for research* we are in fact talking about two elements: first, there is what he calls a 'practical, historical unity' and this, I suggest, can be called *the subject* of the case study; second, there is what he calls the 'theoretical, scientific basis' of the case. This latter forms the analytical or theoretical frame, and this is what I have called *the object* of the study.

The construction of the study: phase 1. Locating a subject and an object

It is important to stress the significance of the separateness of the subject and the object in case study since the distinction between the one and the other is characteristic of all social inquiry, yet relatively neglected in discussion of the case study. It is defined variously in different kinds of research. In his classic work on sociological theory, Wallace (1969, 3) pinpointed the significance in research of the distinction between (a) the thing to be explained and (b) the explanation. He called the former (i.e. the thing to be explained) the *explanandum* and the latter (the thing doing the explaining) the *explanans*. (We can see the *object* as the explanandum and the *subject* as the explanans). Some time earlier, Hempel and Oppenheim (1948) had drawn

attention to the need for such a differentiation to account for the ability of science to answer 'why' rather than simply 'what' questions. In social science, where we also want to answer 'why' rather than 'what' questions, we also need to do this.

For me, this separation of subject and object is the most important piece of guidance for the would-be case inquirer in education. A case study, as a *study* (as distinct from a case illustration or a case history), must in some sense explicate a wider theme: it must help in our understanding of some theoretical issue. The emphasis on the subject, as distinct from a case, also stresses the possibility of plurality and thus the potential for comparison within the subject. A case, by contrast, implies that a case study is necessarily focused on one, singular person, event or phenomenon.

So, this is the first thing that needs to be done: to specify the subject and the object. Mrs Smith or Mrs Smith's class are not sufficient on their own to constitute case study. They must be cases *of* something. If we now introduce an 'of' (such as the notion of 'class enquirer' with my example taken from the ORACLE project's categorisation of teacher styles – see Galton, Simon, and Croll 1980) Wieviorka's call for a 'theoretical, scientific basis' for a study is satisfied. We are now seeing Mrs Smith's class [subject] as a case *of* the class enquirer teacher style [object].

Selection of a subject

The *subject* about which I have just spoken may be persons, groups, time periods, places, events, institutions or any of a range of phenomena that can be studied in their complexity, and, in some sense, their wholeness.

There needs to be an understanding of why a subject is selected for case study research. Typicality or representativeness cannot be a criterion. Even if we know that the case is typical following some empirical work to show that it is typical (a typical Chicago classroom, say, in terms of the ethnicity and age distribution of its students) what could we legitimately do with this typicality in a case study? The researcher cannot say from having studied this classroom that its particular and peculiar circumstances will have in any way contributed *by their typicality* to the situation it finds itself in (whatever that situation is). We could talk about the classroom as a classroom, and be informed about its problems, its tensions, its hostilities and other dynamics but these would not be of interest by virtue of the classroom's typicality, since the next typical classroom would, in all probability, be very different, with its own idiosyncrasies.

There are, broadly speaking, three grounds for selection of a case subject:

(1) a case may be selected because the researcher is intimately connected with it, enabling them to 'soak and poke', as Fenno (1986) puts it;
(2) it may be selected because it is a conspicuously good example of something in which the researcher is interested;
(3) it may be selected because it is different from what is typical: it is an 'outlier'.

I summarise the conceptual path that the intending case researcher might follow in coming to a conclusion about these in Figure 1.
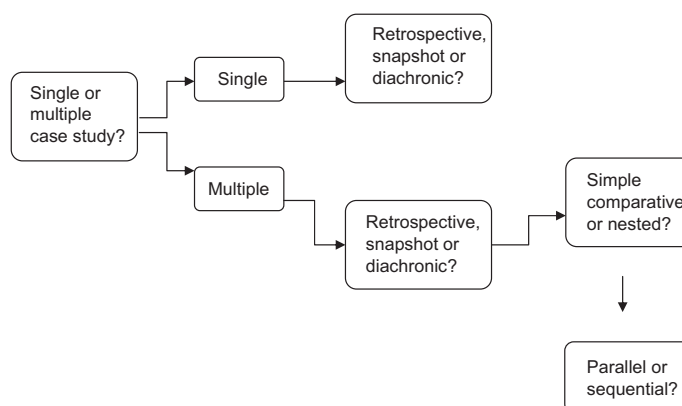
Figure 1.   Where is the study coming from? The subject.

Outlining the object – theory-testing or theory-building

When Wieviorka (1992) made his distinction between the different ingredients of a study (i.e. the practical unity and the 'theoretical, scientific basis') his emphasis in the second part (the part I have labelled the object) is on the wider body of knowledge, both in practical and theoretical terms, surrounding the subject. How is this 'theoretical, scientific basis' for the study to emerge?

Theory has many meanings in social research (Thomas 1997, 2007). When we talk of theory in case study we are talking of analysis that seeks connection, that seeks to conjoin ideas and find explanation. Case study cannot be taken to be a form of inquiry without such theorisation. Without it, the case study is merely illustration. The analysis, the theorisation, is the *object* of the study.

It is this theorisation that is the key to good case study. As Becker (1998, 41) notes, such theorisation is a complex process. The connections we seek in offering explanation should be multi-stranded and multi-directional, he suggests. As he puts it:

> there are many modes of connection, for which we use words like "influence" or "causality" or "dependence." All these words point to variation. Something will vary and something else, dependent on what happens to the first thing, will undergo some change as well.

The notion of simple 'causality', he argues, is inappropriate in these circumstances. The distinction between theory-*testing* and theory-*building* case study rests in the firmness of expectations about the intellectual framework that garners these connections and supports and guides the work. Is this framework something which is set at the outset, a set of ideas to be tested by the case study (theory-testing), or will it be built as the study progresses (theory-building)?

Theory-testing

The assumption here is that there is already some sort of explanatory framework available, the researcher's own, or that provided by others' work, for the

phenomenon or situation under study. The case study is being undertaken to test this explanatory framework, this 'theory'.

Theory-building

Theory-building is about developing a scaffold of ideas, a model that somehow 'unwraps' the subject for the explication of the object. So, in a theory-building case study the researcher will be building a framework of ideas that has no necessary connection to pre-formulated notions about what is important. While it may be impossible for the researcher not to connect to pre-existing ideas at all (see Thomas and James 2006), it is, however, possible to attempt to dismiss any allegiance to pre-existing ideas. Researchers attempting to build theory should, in other words, be open to new interpretations suggested by their data.

The construction of the study: phase 2 – the kind of study

As I have noted, a useful function of the term *subject* is that it serves to make it clear that the focus of interest can be plural: it is not necessarily one person, one event or one phenomenon. There may be more than one: there may, in other words, be different *elements* to the subject of the case study.

Single studies

The single case could be said to be the classic form of the case study. When people think about case studies they think of one person, a patient in a hospital, for example, or a child in a school, or a classic legal case. The single thing is studied for the lineaments of its structure, its character.

Single studies, containing no element of comparison, will take essentially three forms, wherein features of the subject are bounded by time in some shape or form. The case inquirer notices change as it happens and seeks its antecedents and its consequences. We have to find the 'sequence of steps' as Becker puts it (1992, 209) and understand cause in relation to time, with 'each step understood as preceding in time the one that follows it'. In doing this, we conjecture not only about how one thing is related to another but also about how cause and effect change with time as other elements of a situation also change.

The varieties of time-use lead, broadly speaking, to three kinds of study: retrospective, snapshot and diachronic.

- The retrospective study is the simplest, involving the collection of data relating to a past phenomenon of any kind. The researcher is looking back on a phenomenon, situation, person or event, studying it in its historical integrity.
- With the snapshot the case is being examined in one defined period of time: a current event; a day in the life of a student; a month's diary of a headteacher. Whether a month, a week, a day or even a period as short as an hour, the analysis will be aided by the timing of events as they happen. As the snapshot develops, the picture presents itself as a whole over a defined time frame.
- The diachronic study shows how changes may have happened over time, revealing how and why those changes may have happened.
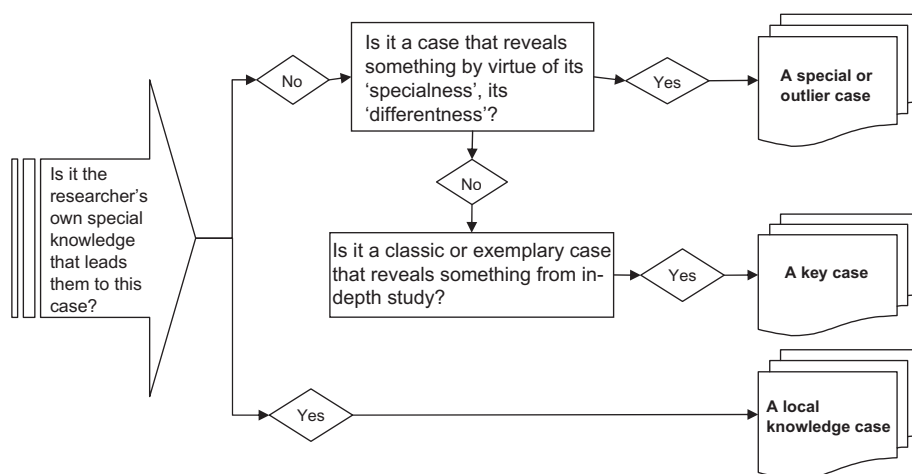
Figure 2.   Choices in undertaking single or multiple case studies.

Multiple studies

Multiple studies also take one of the three forms of retrospective, snapshot or dia-chronic but contain more than one element in their subject. If this is so (that is, if there are two, or several, case subject elements), each individual case element is less important in itself than the comparison that it offers with the others.

If the subject comprises different elements, how can these elements be used for comparison? There are two principal means of doing this:

- Comparison may occur by straightforward comparison between clearly different examples, a simple comparative study. For example, a study might be conducted of two schools' different capacities for making effective use of a visiting education support service. By contrasting the schools' 'biographies' (their histories, catchments, staff relationships and other characteristics) light would be thrown on the relative dynamics affecting the reception and use of the support service. The key focus would not be on the nature and shape of relationships per se in one school, but rather on the nature of the difference between the one and the other and what this might tell us about the dynamics that were significant in this difference.
- Comparison may be of elements within one broader case, comparison, in other words, of nested elements. With nested studies the breakdown is within a lar-ger unit of analysis, for example classes (the nested elements) within a school (the larger unit). A nested study is distinct from a simple comparative study in that it gains its integrity, its wholeness from the wider case. The elements are nested only in the sense that they form an integral part of a broader picture.

A further subdivision may be drawn in the multiple study and this is between parallel and sequential studies. In the first, the parallel study, the cases are all hap-pening and being studied at the same time, while with the sequential study the cases happen consecutively and there is an assumption that what has happened in one or

in an intervening period will in some way affect the next. Figure 2 summarises the choices made in undertaking single or multiple case studies.

Conclusion

There is no one specific method that characterises the case study and case study is not a method in itself. Rather, the case study is a form of inquiry, a *design frame*, as I have discussed the scaffold that structures research (Thomas 2011b, 2013).

Case studies have provided some of the most striking insights into the ways in which schooling happens. Paul Willis's (1993) *Learning to labour,* Harry Wolcott's (1978) *The man in the principal's office* and Stephen Ball's (1981) *Beachside Comprehensive,* have all become classics, each doing much for our understanding of the ways that schools work. They have achieved this by painting pictures in fine-grain detail about the encounters that occur in schools among staff and students. All of them enable what Flyvbjerg (2001, 132) has called a 'getting close to reality'. By this, he meant that they enable researchers to keep in contact with the subjects of their studies and to think with their own experience and their own intelligence. In some cases, they enable a major re-appraisal of the ways in which we build ideas about schools and what goes on within them: Johnston's (1985) and Wright's (2010) case studies, for example, force serious re-thought about many of the pseudo-scientific constructs around which students' 'failure' at school have been framed. It is this 'staying real' that case study is particularly good at encouraging and cultivating, for it eschews methodological formulae and endorses and stimulates a critical, creative approach to problem-solving.

For teacher-learners on post-experience Master's or doctoral programmes, case study offers the opportunity for work just as revealing as that found in these classic examples, enabling in-depth, reflective study grounded in day-to-day experience. On pre-service courses too (such as conventional postgraduate certificate in education (PGCE) courses and the emerging schools-based programmes in the UK, such as School Direct and Teach First) the case study may form the backbone of development projects. If it is formulated, conducted and analysed with reflective inquiry in mind, it can help to develop students' critical understanding of the environments in which they find themselves.

I have to repeat the caution, though, that forms the purpose of this article. Despite their clear strengths, case studies can sometimes appear to lack purpose, direction, argument or conclusion. As Wieviorka (1992, 160) put it:

> It does not suffice to observe a social phenomenon, historical event, or set of behaviours in order to declare them to be "cases." If you want to talk about a "case," you also need the means of interpreting it or placing it in a context.

In other words, while case inquiry may often rely on observation, and to an extent description, these are not ends in themselves and the best case studies go much further than mere illumination. They excavate, elaborate and explicate, offering to teacher-inquirers a form of inquiry that promises kinds of understanding not accessible through other kinds of research. For this to occur, though, the inquirer needs to understand that there are some key ingredients to good case study research with key distinctions to be drawn among various case study structures and numerous valid permutations of these structures open to the case inquirer.

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