



# The NewsUpFront

The Newsletter of UpFront Organization Development Consulting

## CASE STUDIES—METHODS AND PRACTICES

Researchers sometimes choose the case study methodology when a holistic, in-depth investigation is needed. It is often appropriate for evaluation projects, to illuminate findings that are typical of the larger group, or highlight the strengths or weaknesses of a particular approach.

Here is an example of a case study process.

### Setting objectives

Similar to other research methods, the objectives drive the other parts of the process. The researchers work with the client organization to draft an objectives statement that fits the process.

### Research design

For many case studies, verifying the validity of the research is a primary concern. This is often addressed by specifying multiple sources of data. When possible, collecting both qualitative and quantitative information also addresses this concern.

Some researchers advocate framing the research questions as “Who,” “What,” “Where,” “How,” or “Why.” This journalistic approach can help researchers keep the investigation on track and avoid gathering extraneous data.

### Data collection

The researchers collect data from multiple sources. Some of the sources that might be used for an organization case study are listed here:

- Interviews with organization leaders and key personnel
- Interviews with key informants outside the organization (key customers or clients, consultants, partner organizations etc.)
- Direct observation of the organization
- Questionnaires for employees and staff of the organization
- Surveys of “outsiders” that know the organization
- Secondary data collection (industry statistics, local economic conditions, etc.)
- Archival records (background, history, etc.)

### Interviewing

This is often the most important data gathering technique in case study research. The interviews can be open, structured or focused. Often the interview guide makes

Quantitative			Qualitative				
Survey Research	Data Mining	Experiments	Observation	Focus Groups	Depth Interviews	Case Studies	Self Assessment
Telephone	Written	Internet					

Examples of types of research

use of some elements from all three types of interviews.

### Data analysis

The data analysis process is grounded in the overall objectives.

Typically, the researchers sort interview excerpts by subject area and organize them. Similarly, they tabulate, analyze and arrange quantitative data.

Once the overall structure of the information is determined, the researchers then agree on key findings. This provides the outline for the report.

### Reporting

While some case study reports are written in a formal style, users may benefit from an informal, journalistic-style. Similar to results obtained when quantitative research reports that are highly graphical (using many charts and tables), a journalistic style is likely to result in more readers (and therefore, better decision-making) among the user group.

The addition of photography, charts and tables, and other graphical devices will also help make sure the document is read and used.

### About UpFront

UpFront is an organization development consulting firm located in Saint Joseph, Minnesota. We provide organization development, program evaluation and research services. Our company is a partnership between owners Dianne Tuff and Murdoch Johnson—and UpFront's clients.

### Our Mission

To help and support teams, organizations and communities as they merge past experience, present strengths and future dreams to create positive change.

### Our Vision

UpFront works with progressive, socially-responsible organizations on projects that challenge us and build on our strengths. We strive for balance between the professional and personal—and we integrate our personal values into our professional lives.

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