



How to Use Cases in Research Methods Teaching: An Author and Editor's View

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Pub. Date: 2014

Access Date: September 1, 2016

Publishing Company: SAGE Publications, Ltd.

City: London

Online ISBN: 9781473951303

DOI: <http://dx.doi.org/10.4135/978144627305014534935>

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Abstract

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In this section, we provide users with pointers on how to use cases/case studies in research methods teaching.

Teaching using cases is an ever more prominent approach at undergraduate and graduate levels. Cases are used to inform introductory research methods courses, along with courses in statistics, qualitative research, and research training in general. Cases are a key part of research project supervision because they play a vital role in translating the dry and abstract theory of formal course content into a more vivid account of what actually happens in real research projects.

Crucially, cases offer teachers and their students the opportunity to reflect critically on the conduct of an actual research project, and to ask questions of how such research might have been designed differently or of what worked well or less well in a particular research scenario.

In many disciplines, most obviously in Business Studies, the use of cases in teaching is commonplace and needs no introduction. However, in some parts of the Social Sciences, the teaching of courses using cases is more of an emerging trend, and here, teachers in higher education are likely to vary in their familiarity with the use of cases in teaching.

In the following paragraphs, Janet Salmons, one of the original board members for SAGE Research Methods and SAGE Research Methods Cases, sets out her thoughts on how cases can be used to teach research methods. Every teacher will have their own approach to the use of cases, but Salmons' piece, in setting out how she approaches case use in methods teaching, is rich in ideas and suggestions that those new to case teaching might want to consider using with their own students.

Teaching Research Methods with SAGE Research Methods Cases

What Are Research Methods Cases and How Might They Be Used?

A research methods case, or case study, is a narrative account of the conduct of an actual study from the perspective of the researcher. Often, a particular dilemma or process is

embedded within the narrative; it is a snapshot of a situation at a specific point in time. Some cases focus on the conduct of an entire research project from start to finish, while others focus on the application of a particular method or theory within the context of a larger study. The best cases will bring the story of doing research to life for readers. Case studies are designed to encourage students to extricate the key issues and understand alternative ways to address the problems presented.

Students can use the case as a springboard for related research and writing, problem solving and discussion. Assignments for individual students can ask them to dig into various dimensions of the case. Case analysis can also be a fruitful basis for team projects to promote student-to-student exchange and peer learning. Team members can look at the situation presented in the case from various positions and work together to explore it more deeply.

Active learning encourages students to bridge theory and practice, and case analysis provides one kind of experiential opportunity for realistic problem solving. Unlike field placements or practicals, case analysis allows for safe experimentation and reflection without concern for the impact on real organizations or participants.

Given these points about teaching and learning with cases generally, how can *research* cases be used in teaching and learning? These cases offer something different from an article or book about research methods: the experiences of researchers who confront the challenges of moving from orderly research design to the reality of actual participants and a messy world. Readers see their intentions and plans, their decision making, and work-arounds. By exploring these cases, students can gain a realistic sense of the role of the researcher and the nature of research. Perhaps most importantly, research case analysis offers students a chance to see that there are no easy answers and that often there is not one right answer when designing and conducting research.

Using Case Analysis to Develop Students' Skills and Understanding

Case analysis uses critical and creative thinking. The process of analyzing the issues, conducting further research, and proposing solutions can add an experiential dimension to research methods courses that allows the building of higher order skills in a way that simpler reading-and-writing assignments do not. Learning potential for case analysis can be described using the categories from Bloom's Taxonomy (Bloom, Engelhart, Furst, Hill, & Krathwohl, 1956). You can adapt the following descriptions, together with learning objectives included with each case study, to articulate appropriate objectives for the assignment(s) or projects you design for your class:

- *Knowledge*: Students are asked to use research cases and related literature to define terms, concepts and research approaches.
- *Comprehension*: Students are expected to understand the research approach described in the case and be able to use this understanding to explicate key dimensions of the research design and conduct of the study.
- *Application*: Students are expected to apply ideas or theories from the class into a situation presented in the case study.
- *Analysis*: Students are expected to distinguish motives and assumptions that underlie circumstances and diagnose the problems presented in the case study.
- *Synthesis*: Students are asked to draw on multiple sources to develop different approaches to conducting the study described in the case. Based on their analysis, they develop recommendations for solving the problems presented in the case.
- *Evaluation*: Students are expected to evaluate the research presented in the case, develop alternative approaches, and judge the value and effectiveness of recommendations they have chosen. In class discussion or team projects, they may also evaluate their analysis and recommendations in comparison to those suggested by classmates.

Key Steps for a Research Methods Case Analysis

You should consider ways that case analysis would fit with the goals and objectives of your course, the academic level of the course, interests and characteristics of your students, and the amount of time available. One possible approach is to select the cases and related readings based on the methods used; another alternative is to select additional readings suggested by the case author. If you can allot more time, students can be asked to choose cases that interest them and carry out their own research to learn more about the approaches described in the case, the circumstances, and background of the study. More advanced students could practice research design by developing a different approach for carrying out the study presented in the case, or practice some of the skills used by the researcher.

The following steps outline options that you can adapt and build on. One possible approach is to use them as the basis of stand-alone assignments; another is to use them as a whole and build an in-depth project. You can look for ways to use selected steps as the basis for incremental activities over several class units or weave them throughout an entire course or seminar. They would work in online, on-campus-based, or hybrid courses. See the following section for specific suggestions for applying this case analysis approach to team projects.

The following outline is offered as a catalyst for your own creative use of cases with your students. Each case study includes exercises and/or discussion questions that can be adapted

to seed class discussion throughout the process of case analysis.

1. Understand the research approach.

Ask your students to identify the research design elements described by the case author. Once they have identified the qualitative or quantitative methodologies and methods, they will have a basis for understanding and evaluating the research approach. After students review the case, you can ask them the following questions and direct them to outline their initial analysis:

- what research approach is followed? Is it clear from reading the case? Does the case author utilize qualitative, quantitative, or mixed methods?
- what, if any, epistemological or theoretical frameworks are described in the case? Is it clear from reading the case? Find at least one source to read and familiarize yourself with the selected epistemologies or theories.
- what methodologies are described in the case? What methodologists are referenced? Find at least one source to read and familiarize yourself with the basic principles and perspectives represented in this methodology.
- what methods are used to collect and/or analyze data in the case? What methods texts are referenced? Find at least one source to read and familiarize yourself with the basic steps and approaches associated with the selected method(s).
- outline information derived from this exploration to create a context for your analysis.

2. State the problem.

Ask your students to identify and explore the problem(s) faced by the case author in conducting the research:

- have students identify a problem the case author faced in conducting the research. The 'problem' could be an issue in implementing the study as designed, dilemma involving the participants or site, challenging decision, need to change approach while the study was underway, or some other concern.
- ask students to determine whether the problem relates to research design, research site, case author preparation or skills, research approach, or something outside the researcher's control. If the case contains multiple problems, have students categorize them.
- have students create a statement that clearly and succinctly describes the problem(s) presented in this case.
- ask students with research experience to articulate at least one situation, dilemma, or

decision they have faced as researchers in designing or carrying out their own projects.

This problem can become the basis for discussion and/or further exploration.

3. Broaden the inquiry; research the problem.

Ask your students to look beyond the selected case and integrate broader understanding of the identified problem(s):

- have students locate, evaluate, and integrate other information relevant to the problem described by the case author. Assign students additional reading to learn more about the research design, methods, approach, research site, or population as needed to grasp the situation the case author discussed.
- ask students to compare and contrast the identified problem with issues researchers have described in other studies, texts, and readings for this course: Is the problem widespread or limited to approach portrayed in the case? Does the problem represent larger issues that other researchers need to understand and be prepared to address?

4. Offer alternative solutions and approaches to the problem.

Ask your students to think creatively about other ways the case author could have proceeded, and to apply the knowledge they have gained from researching the case:

- encourage students to use information found in their research on the methodology, methods, and specific problem, as well as from course materials to offer two or more alternative solutions or ways to address the problem.

5. Evaluate each alternative.

Ask your students to think critically about alternatives and their implications:

- have students critically assess the alternatives defined in step 4.
- ask students to compare and contrast their respective alternatives with the ways the case authors handled the problem.
- ask students to describe the implications and key steps for implementation of each alternative. Advise them to consider the researcher, design, external and internal factors, and other relevant trends. Once again, encourage students to utilize course texts and other resources to support their evaluative process.

6. Offer your best recommendation.

Ask your students to make a choice about the best alternative and provide a well-supported rationale for the selection:

- assign students to recommend the best alternative, based on their work in step 4 and

evaluation in step 5. Have students support and justify their recommendation.

7. Summarize the likely result and strategy for overcoming any obstacles that may hinder the execution of the recommendations identified in step 6.

Ask your students to outline how the selected approach might really work, and anticipate how they might deal with impediments or complications. You might ask them to present this summary to the class, or to create a written report:

- use the following questions to facilitate class discussion: What outcomes might result from the implementation of the selected alternative? What factors may enable or obstruct successful implementation? What actions could address these factors?
- have students create a written report or presentation as an assignment.

8. Finally, review your case analysis as a whole.

Ask your students to give their assignments a final review before completion. Their presentations and/or exchange of reports can seed class discussion to compare and contrast their interpretations of the cases. For each student, consider the following:

- does the assignment demonstrate the student's comprehension and synthesis of course concepts?
- has the student presented the paper using the format you assigned, including abstract, correct citations, and a list of references?

Team Case Study Analysis

Researchers may work alone or in teams and, similarly, case analysis can be conducted by individual students or by groups. Depending on the goals of your course, you may decide that students would benefit from the experience of working together. You can adopt a case analysis approach to be carried out as a collaborative learning project that includes both individual and collaborative steps. One approach is to assign each dyad or team of three to five students to analyze the same case study. The class as a whole could include teams working through a variety of cases. Depending on course goals, you can select cases to represent specific research approaches or methods. Alternatively, each team can select a case that interests them.

1. Understand the research approach.

Ask team members to discuss the design elements described by the case author and identify the approach(es) used. Once they have identified the qualitative or quantitative

methodologies and methods, they will have a basis for understanding and evaluating the research approach. Use the following outline to facilitate group work:

- each student identifies one or more aspects of the case, and locates relevant resources needed to understand the research paradigm, epistemology, and so on.
- students share and review each other's work and read related materials.
- students discuss the case as a whole and develop a composite plan as needed to move forward with the analysis.
- each team reports to the full class. The class discusses the research approaches represented in selected cases.

2.State the problem.

Ask team members to find situations, dilemmas, or decisions the case author faced in designing or carrying out the study. After discussing their various perspectives, they can choose one 'problem' to use as the basis for discussion and/or further exploration. The following stages can be used to guide this activity:

- each student reviews the case to identify a problem the researcher faced in conducting the study.
- students discuss the identified problems and decide collaboratively which one will be central to their analysis.
- students work together to create a short statement that outlines the problem.
- each team explains or submits the problem statement to the class as a whole. Class discusses the problems represented in selected cases.

3.Broaden the inquiry; research the problem.

Have team members to look beyond the selected case and integrate broader understanding of the identified problem(s) by following these steps:

- working individually or in dyads, team members locate information relevant to the problem described by the researcher.
- students share information and collaboratively evaluate and integrate ideas.
- in discussion with the entire class, students compare and contrast the identified problems with issues researchers have described in other studies, texts, and readings for this course.

4.Offer alternative solutions and approaches to the problem.

Ask team members to think creatively and generate several possible ways the researcher could have proceeded. You may want to describe the following steps and/or spell out

expectations for how you want them to apply the knowledge they have gained from researching the case.

- working individually or in dyads, team members generate one or more solutions or approaches to addressing the problem.
- team members share solutions and create a composite list.

5. Evaluate each alternative.

Guide team members through the following activities to encourage them to think critically about alternatives and discuss their implications:

- working individually or in dyads, team members critically assess each alternative defined in step 4. They may decide to combine or refine alternatives.
- the team discusses implications and key steps for implementation of each alternative. Together, they consider the researcher, design, external and internal factors, and other relevant trends.
- teams report to the class to describe their evaluative processes.

6. Offer your best recommendation.

Ask team members to come to an agreement on the best alternative, and to work collaboratively in the following steps to provide a well-supported rationale for the selection:

- the team collaboratively builds on steps 4 and 5 to decide on one alternative.
- discuss ways to support and justify the recommendation. Identify resources needed to support the recommended approach.
- teams report to the class to describe their recommendations.

7. Summarize the likely result and strategy for overcoming any obstacles that may play into the execution of your solution.

Ask team members to play out the way the selected approach might really work, and anticipate how they might deal with impediments or complications. You might ask them to present this summary orally to the class, or to create a written report. Depending on the nature of the course, they might use a role-play to practice skills. Choose the appropriate option(s) for your class:

- the team discusses outcomes that might result from the implementation of the selected alternative.
- the team identifies factors that may enable or obstruct successful implementation and suggests ways to use or address them.

- the team practices by role-playing or simulating the approaches they recommend.
- the team compiles a written report or prepares a presentation of the cases analysis.

8. Finally, review your case analysis as a whole.

Ask team members to review, edit, and finalize the deliverable. Their presentations and/or exchange of reports with other teams can seed class discussion. The following activities and questions are recommended for presenting and reviewing each team's analysis:

- team submits, shares, or presents the analysis.
- does the analysis demonstrate the team members' comprehension and synthesis of course concepts?
- has the team presented the analysis using the assigned format, including abstract, correct citations, and a list of references?

Reference

Bloom, B., Engelhart, M., Furst, E., Hill, W., & Krathwohl, D. (1956). *Taxonomy of educational objectives, book 1: Cognitive domain*. New York: David McKay.