

George Mason University  
College of Education and Human Development  
Research Methods

EDRS 826-002 - QUALITATIVE CASE STUDY METHODS  
3 Credits, Fall 2023  
Monday, 9am-11:40am Thompson Hall 1010 – Fairfax Campus

**Faculty**

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**Prerequisites/Corequisites**

**Required Prerequisites:** EDRS 812<sup>B-</sup> or 812<sup>XS</sup>.  
<sup>B-</sup> Requires minimum grade of B-.  
<sup>XS</sup> Requires minimum grade of XS.

Enrollment is limited to Graduate level students.

**University Catalog Course Description**

Advanced research seminar on qualitative case study design and application in educational research. Topics include descriptive, theoretical, evaluation, and policy case study design and methods. Students will conduct and critique a case study appropriate to their discipline.

**Course Overview**

As an advanced applied research methods seminar, this course will require the design, implementation, and critique of a qualitative case study (pilot study for dissertation or small portion of research in progress, dissertation or other project). Assignments consist of a proposal or draft of the project (due midway through the semester) and a final qualitative case study report (due at the end of the semester). Keep in mind this is a METHODS course, so the focus of the assignments will be on support and critique of methods across the research process. There are two options to complete the case study proposal and final paper:

1. **HSRB-approved study** that can be used as a formal pilot study for your dissertation (your dissertation chair or lead research faculty approves your application). This option allows you to publish/present your work since you will have a small but complete project!
2. **Conceptual paper** that focuses more on methods development and critique across possibilities. You will still collect “data” to complete course assignments, but for piloting methods only! I must approve your data collection (participant criteria/data collection guides); these data MAY NOT be used beyond course assignments.

There are five main components of the course:

1. **Class meetings.** Each class will incorporate a blend of mini-lectures on key topics, demonstrations, class exercises, and/or discussion.
2. **Discussion.** We will dedicate a considerable amount of time to discussion; be prepared to connect your specific interests to the readings and to offer feedback to peer projects.
3. **Assigned readings.** These readings are an essential part of the course; they provide necessary preparation for class lectures, activities, and discussions, and they cover important aspects of qualitative case study research for further learning and understanding. Additional readings are provided to support individual exploration of case study research methods and application. Reading assignments are listed for the day on which they will be discussed. I expect you to come to class prepared to discuss the reading assignments, and I encourage you to share with the class other readings and examples you have found that are relevant. Before beginning the readings, I suggest that you ask yourself what your questions and concerns are about this issue. After finishing a reading ask yourself how it related to your questions or concerns. Outline the author's main points and consider these questions:
  - Did the reading answer your questions? Did it raise new issues?
  - Do you agree or disagree with the author?
  - If an example of a qualitative article is also assigned, analyze it in terms of the methodological readings: How do the ideas apply? How do they not apply? What are their implications for this study?

We will be reading texts that present different perspectives on the same topic. Think about each author's approach to qualitative research as you read, and how these differences contribute to or challenge your own understanding and use of qualitative case study.

4. **Case study project.** An individual (or collaborative) pilot qualitative case study research project. Guidelines for this project are provided in the section on rubrics and will be discussed in class.
5. **Participation.** This class will be collaborative and interactive—be prepared for discussion! Questions are encouraged and expected, and alternative viewpoints are welcome. I value contributions to our discussions and ask you to speak up! However, I do expect you to support your assertions. Also, I expect all of us to create an educational climate of open debate that is respectful and democratic. Further, be familiar with the GMU Honor System and Code. Your participation as a class member will be evaluated, not by the *quantity* of your contribution, but by the *quality* and *integrity* of your contribution.

### Course Delivery Method

This course will be delivered as a hybrid seminar with the majority of meetings being held on campus. Five asynchronous dialogue sessions will be available via Blackboard Discussion forums for scholarly conversations related to non-graded assignments and peer review.

### Learner Outcomes & Objectives

This course is designed to enable students to do the following:

1. Understand the characteristics of qualitative case study research and the key ways in which this approach differs from other research strategies. Students will identify various forms of qualitative case study research, as well as appropriate methods of data collection and analysis, depending on purpose and design of their research project.
2. Design and conduct a qualitative case study. Students will apply their personal philosophies of qualitative research to the development and implementation of a case study project.
3. Understand the assumptions embodied in the major approaches to qualitative case study research, and the implications of these for doing and evaluating qualitative case studies. Students will situate their studies in an appropriate problem related to their field of study.
4. Communicate (both verbally and in writing) the design and process, and critique the process of the study. Students will identify appropriate avenues for dissemination of their research. Also, students will critique their own and peers' research projects, and they will suggest areas for improvement.

### Professional Standards

Not applicable

### Readings

#### ✓ Required Texts

Stake, R. E. (1995). *The art of case study research*. Sage.

*Other readings as assigned.*

#### ✓ Suggested Texts

Patton, M. Q. (2015). *Qualitative research and evaluation methods* (4<sup>th</sup> ed.). Sage. [NOTE: **Strongly recommended if you need or want additional intermediate guidance on qualitative methods.**]

Saldaña, J. (2016). *The coding manual for qualitative researchers* (3<sup>rd</sup> ed.). Sage. [NOTE: **Strongly recommended if you need or want additional guidance on qualitative analysis. Most students who have invested in this text use it in every qualitative class, dissertation, and other research projects.**]

Stake, R. E. (2006). *Multiple case study analysis*. Guilford Press. [NOTE: Strongly recommended if are interested in multiple case study and/or updated version of Stake's (1995) text.]

Yin, R. K. (2014). *Case study research: Design and methods* (5<sup>th</sup> ed.). Sage. [NOTE: Strongly recommended for those who prefer a less constructivist approach to case study. Some of you might prefer this text to Stake (1995); we will discuss options our first meeting or you can email me.]

## Course Performance Evaluation

Students are expected to submit all assignments on time in the manner outlined by the instructor. **All assignments will be submitted via email as a WORD ATTACHMENT to the instructor before class (9am) on the due date.**

- **Assignments**

### *Participation*

This is an advanced methods course, and engagement is expected and necessary. I want to emphasize our obligation to critical thinking, reasoned discussion, and self-critique. Participation is NOT ATTENDANCE! You will have opportunities to participate through synchronous in-class discussion, asynchronous Blackboard discussion, and providing feedback to peers as they develop their proposal and final paper. Please acknowledge peer feedback on your abstract page.

Participation will be evaluated according to the following criteria:

- ✓ Prepared for discussion and tasks. This includes reading material and attending any team meetings.
- ✓ Maintains balance between speaking and listening roles. I do not expect you to 'time' yourself; be aware, though, 'strong' personalities overpower a discussion. Monitor your team and classroom interactions!
- ✓ Listens attentively and offers constructive feedback. All contributions should be considered and negotiated.
- ✓ Accepts diversity in viewpoints and negotiates differences. You are not expected to agree with one another at all times! However, we will be respectful and professional.
- ✓ Shares leadership roles (if applicable). While it is comfortable to let 'managers' and 'organizers' plan team strategy, this will result in a vision defined by one person.

### *Research Draft Report*

You will develop a research draft report that communicates your design choices and rationale. We will discuss formats in class. However, if you want to use this as a part of your dissertation, I suggest strongly that you talk with your advisor about technical expectations. I want this to be a useful foundation for both your class research project and academic development.

*Research Project*

You will develop and conduct a qualitative case study based on your research interests and program of study. This project results in a comprehensive paper that may be submitted for presentation and/or publication, and/or used toward your dissertation. The research project is a major part of the work of this course. The range of possible projects that you can conduct is extremely broad.

If you are studying a setting where you have a prior role, or are interviewing people with whom you have a prior relationship, you need to **discuss with me the special issues that this raises**, and will need to address these issues in your final report. You are free to use as a setting for your research project the same site that you are using in work for another course or for an internship. However, if you do this, the amount of work involved must be appropriate for the total amount of credit--normally, you can't use the same work (e.g., turning in the same report) to get credit for two courses. In any case, if you are using the work to satisfy two different courses or requirements, you **must submit, both to me and to the other instructor or supervisor, a written description of how you will use your work in this setting to satisfy the requirements of both courses**, and get our signatures indicating our approval of your plans.

As part of the project, you will write a research report. This final report should not exceed 20 pages (double space, one-inch margins): this page limitation does not include title page, abstract, references, and appendices.

*Other Assignments*

Other non-graded assignments are expected during the course and contribute to your final project report. **I will not accept late non-graded assignments.**

*Weighting for Assignments*

Assignment	Points
Participation	25
Proposal/Draft	25
Final Paper	50
Total	100

• **Grading**

A+	98-100%	B+	88-89%	C	70-79%
A	93-97%	B	83-87%	F	below 70%
	A-90-92%				
	B- 80-82%				

*Other Policies*

Grades on assignments turned in late will be reduced 10%, and assignments more than one week late will not be accepted. Data collection and analysis assignments are required for completion of the research paper. These assignments are not graded, but they are the foundation of your research project. To receive timely feedback, assignments must be completed by the due date. Following are the assessment guidelines for the project proposal/draft and final paper.

### **Project Draft Guidelines**

The project draft includes three general areas: (1) what you are interested in studying—purpose and conceptual framework for your case study methods, (2) case study design, and (3) proposed/actual methods.

- The purpose of the study should be a well-worded, concise statement of research intent. Keep in mind your resources, unit of analysis, and audience. Remember, your purpose guides the entire research process—keep it relevant, balanced, and doable!!! The conceptual framework for your case study methods includes discussion of your paradigm (ontology/epistemology, axiology, and methodology), researcher identity/positionality statement, and personal/professional relationship to the study site/participants. Remember to connect to readings and support your choices; this is a METHODS COURSE. I am NOT evaluating your opinions or experiences, but how you connect and support those to your design choices!
- What type of case study are you conducting (single/multi-case study, intrinsic/instrumental/layered/other scope)? What are the components of your case study: boundaries, unit of analysis, report style (description/theoretical/evaluation/blend)?
- Your methods will evolve during the research process. In the draft, you need to explain and support proposed design choices, including site and/or sample selection, data collection methods, and data analysis techniques.

Length: Maximum length is 10 pages, not including title page, abstract, references, and appendices.)

### **Research Paper Guidelines**

Assignment: You will conduct a case study based on your research interests. A minimum of three data collection events are required to complete the study and may include single/multiple face-to-face depth interview, observation, and journal or document analysis. Data will be transcribed, coded, and analyzed according to criteria discussed in class.

Length: Maximum length is 20 pages, not including title page, abstract, references, and appendices.

Style Format: APA latest edition, research paper

This assignment requires the integration of knowledge and application of basic data collection

and analysis techniques for case study research projects. It will be evaluated according to general standards of qualitative research. The presentation and paper should address the following:

Introduction (BRIEF problem statement if needed, purpose of study, research questions)

Conceptual framework for methods

Methods (design, methods of data collection and analysis, selection, quality/ethics)

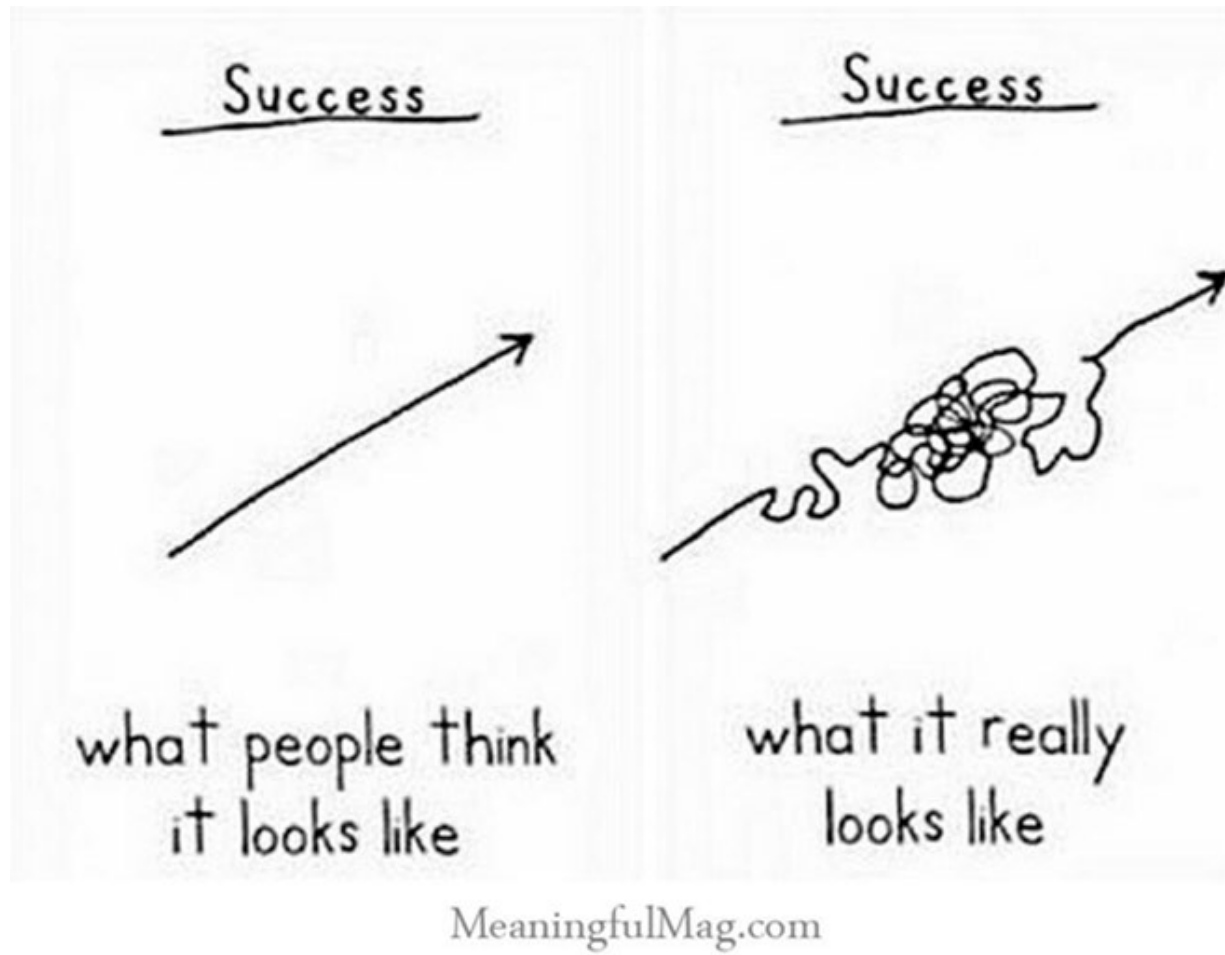
Findings (emerging themes/categories, supporting evidence)

Discussion and Recommendations (critique of methods, boundaries/limitations, further research—keep your focus on methods)

References and Appendices (include a copy of your IRB approval page, if applicable)

This assignment evaluates your knowledge, use, and critique of qualitative case study methodology. However, the findings should be relevant, supporting the purpose of the study.

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**Assignments: General Guidelines/Assessment Rubric**

___	20%	Problem/Purpose Development	R/C ___	I/E ___	T ___
___	20%	Methodology	R/C ___	I/E ___	T ___
___	20%	Findings/Discussion	R/C ___	I/E ___	T ___
___	20%	Critique of Methodology	R/C ___	I/E ___	T ___
___	20%	Technical	R/C ___	I/E ___	T ___
___	<b>100% Total Score: Final Paper</b>				

**Reflection and Critique:** avoids surface presentation and summary of topic; identifies and meets relevant need; provides neutral presentation of strengths and weaknesses of topic; evaluates strengths and weaknesses; states and supports position.

- B-** Reflective on experience and personal opinions; no critique
- B** Reflective on experience; reflection of material and/or theory embedded
- B+** Reflective of material and/or theory
- A-** Critique initiated; critique lacks validity and is not maintained
- A** Critique initiated; critique is valid but not maintained
- A+** Critique initiated; critique is valid and well maintained

**Integration and Evidence:** provides comprehensive connections across course material (*i.e.*, readings, discussions, previous learning, and personal experiences); balances theory and practice; provides appropriate and adequate support for ideas, facts, and propositions.

- B-** Material **OR** experience integrated to some degree; inadequate support
- B** Material **AND** experience integrated to some degree; inadequate support
- B+** Material **AND** experience integrated well; inadequate support
- A-** Material **OR** experience integrated well; limited support
- A** Material **AND** experience integrated well; partial support is valid but not maintained
- A+** Material **AND** experience integrated well; conclusive support is valid and maintained

**Technical Soundness:** characterizes professionalism and scholarship; attends to audience composition and needs; exhibits drafting and editing appropriate for graduate-level work. Marked items require attention:

___ Grammar	___ Readability	___ APA Style
___ Punctuation	___ Tone/Voice	___ Cover page
___ Spelling	___ Language	___ Abstract
___ Agreement	___ Flow	___ Citations
___ Sentence structure	___ Transitions	___ Quotations
___ Paragraph structure	___ Preview/Summary	___ References

**Professional Dispositions**



See <https://cehd.gmu.edu/students/policies-procedures/>.

### Core Values Commitment

The College of Education and Human Development is committed to collaboration, ethical leadership, innovation, research-based practice, and social justice. Students are expected to adhere to these principles: <http://cehd.gmu.edu/values/>.

### GMU Policies and Resources for Students

- Students must adhere to the guidelines of the Mason Honor Code (see <https://catalog.gmu.edu/policies/honor-code-system/>).
- Students must follow the university policy for Responsible Use of Computing (see <https://universitypolicy.gmu.edu/policies/responsible-use-of-computing/>).
- Students are responsible for the content of university communications sent to their Mason email account and are required to activate their account and check it regularly. All communication from the university, college, school, and program will be sent to students **solely** through their Mason email account.
- Students with disabilities who seek accommodations in a course must be registered with George Mason University Disability Services. Approved accommodations will begin at the time the written letter from Disability Services is received by the instructor (see <https://ds.gmu.edu>).
- Students must silence all sound emitting devices during class unless otherwise authorized by the instructor.

### *Campus Resources*

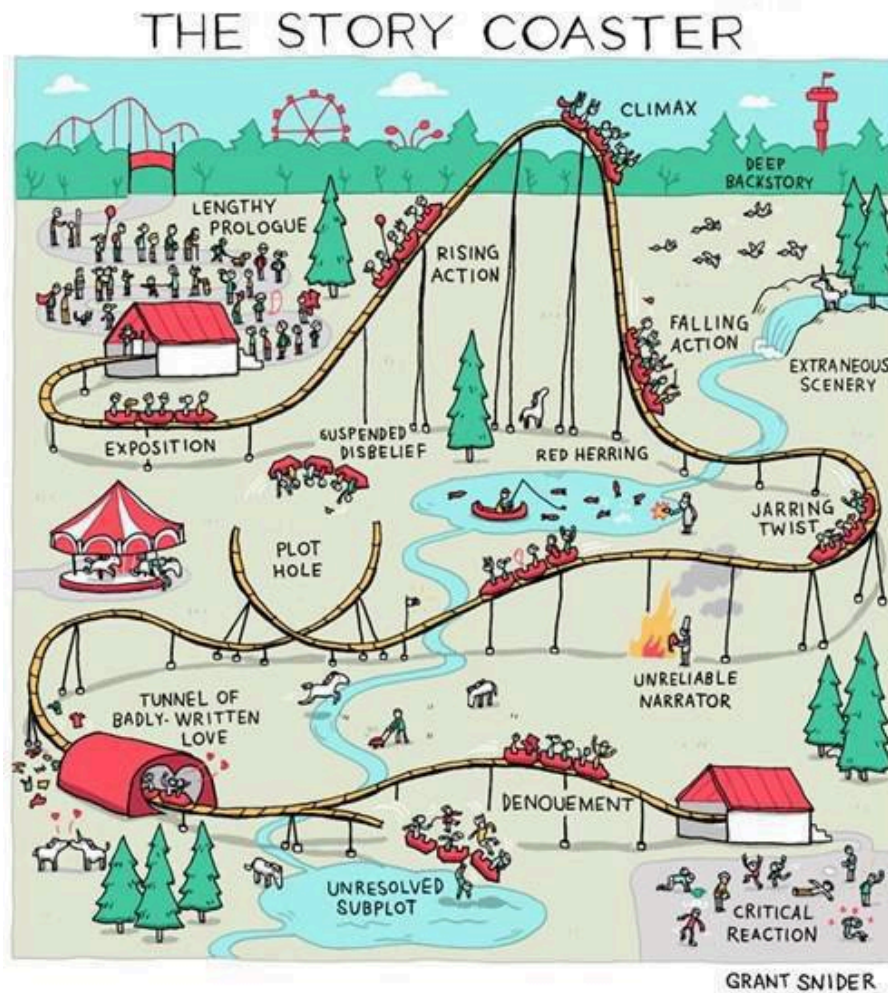
- Support for submission of assignments to VIA should be directed to [viahelp@gmu.edu](mailto:viahelp@gmu.edu) or <https://cehd.gmu.edu/aero/assessments>. Questions or concerns regarding use of Blackboard should be directed to <https://its.gmu.edu/knowledge-base/blackboard-instructional-technology-support-for-students/>
- For information on student support resources on campus, see <https://ctfe.gmu.edu/teaching/student-support-resources-on-campus>.

## Notice of mandatory reporting of sexual assault, sexual harassment, interpersonal violence, and stalking:

As a faculty member, I am designated as a “Non-Confidential Employee,” and must report all disclosures of sexual assault, sexual harassment, interpersonal violence, and stalking to Mason’s Title IX Coordinator per [University Policy 1202](#). If you wish to speak with someone confidentially, please contact one of Mason’s confidential resources, such as [Student Support and Advocacy Center](#) (SSAC) at 703-380-1434 or [Counseling and Psychological Services](#) (CAPS) at 703-993-2380. You may also seek assistance or support measures from Mason’s Title IX Coordinator by calling 703-993-8730, or emailing [titleix@gmu.edu](mailto:titleix@gmu.edu).

For additional information on the College of Education and Human Development, please visit our website <https://cehd.gmu.edu/students/>.

NOW, on to the class schedule, materials, and the messy work of developing, implementing, and writing a qualitative case study....



## Class Schedule and Readings

**SECTION 1 PHILOSOPHY & DESIGN OF QUALITATIVE CASE STUDIES**

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**08/21 Principles of Case Study Research**Recommended

Yazan (2015) Three Approaches to Case Study Methods  
(<https://nsuworks.nova.edu/tqr/vol20/iss2/12/>)

**08/28 Discussion of Proposed Projects**Required

Baxter & Jack (2008) Qualitative Case Study  
Flyvbjerg (2006) Case Study Misunderstandings  
Stake (1995), Chpts. 1, 3, 10

***DUE (Participation): Please post a paragraph or two (no more than one page) to Bb Discussion Forum explaining your project idea and how you expect this course to meet your goals. Also, introduce yourself to the class professionally to encourage peer feedback and participation. I encourage you to do this as soon as possible to begin developing connections to others in the course who have similar interests and/or are willing to provide critical feedback.***

**09/04 NO CLASS: Labor Day****09/11 Designing a Case Study**Required

Hiller & Reybold (2019) CS Adolescents as Citizen Scientists  
Reybold, Lammert, & Stribling (2013) Selection  
Stake (1995), Chpts. 2, 6-7

Recommended

Anaf et al. (2007) CS & Systems Theory  
Reybold (2018) Reclaiming Triangulation  
Stake (2006), Chpts. 1-2

***DUE: HSRB Approval if applicable (submit approval letter via email) OR MY Approval for a conceptual project.***

**09/18 DIALOGUE (Asynchronous Blackboard Discussion): Philosophy & Design of Qualitative Case Study Research**

*DUE (Participation): Post a one-page visual and/or narrative conceptual framework/design of your proposed qualitative case study (MS Word or PDF). Be sure to identify the principles of your study that align with case study research, your unit of analysis, and general proposed methods.*

**SECTION 2 CASE STUDY DATA COLLECTION METHODS**

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**09/25 Methods of Data Collection (Interviews)**

Required

Corbin & Morse (2003) Interviewing Sensitive Topics/Insider Status  
 Enosh & Buchbinder (2005) Narrative Styles in Sensitive Interviews  
 Kvale (2006) Interview  
 Stake (1995), Chpt. 4

Recommended

Caldwell (2013) Dyadic Interview  
 Goldring et al. (2003) CS Transitional Leadership

**10/02 Methods of Data Collection (Observations, Documents)**

Required

Brown & Durrheim (2009) Mobile Interviewing  
 Leigh (2013) Insider Dilemma  
 Perry, Reybold, & Waters (2014) MM CS Occupational Choice  
 Reybold, et al. (2016) CS Policy Paradox

Recommended

Lipka et al. (2005) CS Math in Culture  
 Ramos (2007) CS FotoDialogo Method  
 Zembylas (2005) CS Emotions in Teaching

**10/09 NO CLASS MEETING: Fall Break... BUT....**

Rather than move the class meeting to Tuesday (as noted in the fall schedule), we will schedule individual meetings via Zoom.

**10/16 DIALOGUE (Asynchronous Blackboard Discussion): DC Methods**

*DUE (Participation): Post a one-page visual or narrative of your proposed data collection methods and connect them to your research questions (MS Word or PDF). Identify the rationale for each choice.*

**SECTION 3 ANALYZING CASE STUDY RESEARCH DATA**

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**10/23 Analysis: Topical, Thematic Techniques**Required

Stake (1995) Chpt. 5

Attride-Stirling (2001) Thematic Networks

Konopasky &amp; Reybold (2015) CS Accessing the World

Recommended

Adair &amp; Pastori (2011) Coding Frameworks for Large-Scale Projects

Ryan &amp; Bernard (2003) Theme Identification

***DUE: Research Proposal/Draft*****10/30 Analysis: Iterative, Theorizing Techniques**Required

Corbin &amp; Strauss (1990) Grounded Theory Methods, CCA

Reybold et al. (2008) CS SAE Ethics

Reybold et al. (2014) CS Counselor Educators &amp; Hurricane Katrina

Recommended

Reybold &amp; Halx (2018) DRAMA SAE Ethics

Stake (2006) Chpt. 3, 9

**11/06 Analysis: Deciphering the Language QR Analysis**Required

Reybold (2003) Pathways to the Professorate\*

Reybold et al. (2012) CS Dissertation Advising\*\*

Recommended

\*Choose at least one article from this list (articles are from my longitudinal GT study of faculty identity; we will discuss these in relation to the Pathways article).

1. Reybold (2005) Surrendering the Dream, Faculty Disillusionment

2. Reybold (2008) Social &amp; Political Structuring of Faculty Ethics

\*\*Choose at least one article from this list (articles include institution-based analyses/evaluations).

1. Halx &amp; Reybold (2005) CS Pedagogy of Force

2. Reybold &amp; Halx (2012) CS Meaning of Interdisciplinarity

**11/13 DIALOGUE (Asynchronous Blackboard Discussion): Qualitative Methods of Analysis**

*DUE (Participation): Post a one-page visual and/or narrative of your proposed data analysis methods and connect to your data collection choices (MS Word or PDF). Be sure to identify the rationale for these connections and how each contributes to your research questions and goals of your study.*

**SECTION 4 DISSEMINATION OF CASE STUDY RESEARCH**

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**11/20 Writing a (Quality) Case Study**

Required

Ghaffar-Kucher (2014) Writing Culture  
Nind et al. (2012) Methodological Innovation  
Stake (1995) Chpts. 8-9

Recommended

Stake (2006) Chpt. 5  
Review student examples posted to Blackboard.

**11/27 DIALOGUE (Asynchronous Blackboard Discussion): CS Report Discussion**

*DUE (Participation): Post a one-page visual or narrative of your final project (MS Word or PDF).*

**12/03 DUE: Final project paper. Submit by email to me by 11:59pm. (University scheduling issue related to “reading days” for finals....)**

**NOTE:** Faculty reserves the right to alter the schedule as necessary, with notification to students.