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A Systematic Approach to Multiple Case Study Design in Professional Counseling and Counselor Education

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Abstract

Case study research is a qualitative methodology that allows researchers to explore complex phenomena in a structured way, that is rigorous and provides an enormous amount of depth. Three scholars are credited with major contributions to the case study literature: Merriam (1998), Stake (1995/2006), and Yin (1994). The purpose of this paper is to explore case study design for use in the counseling profession. The authors provide instruction on the case study scholars, data collection, analysis, and reporting for both single and multiple case study research designs. Finally, implications for student counselors, counselor educators, and counseling professionals are provided.

Keywords

Case study, multiple case study, qualitative research, research design, counseling

Author's Notes

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Multiple case study could be a powerful tool in the field of professional counseling and counselor education (CE). This type of research can support our understanding of a variety of classroom and clinical phenomena that are challenging to isolate from their context. This paper focuses on the use of multiple case study in the field of counseling and CE, but to understand multiple case study you must first understand how and what a single case study is.

Case study is a research inquiry that investigates a phenomenon within its environmental context aiming to generate a holistic description. The distinguishing factor that delineates case studies from other types of research inquiry is the boundedness of the case (Merriam 1988; Yin 1994). Case study research has a long history of use in psychology to disseminate information about a variety of client issues. Examples of cases in counselor education could include a classroom, a counseling session, an organization, or a small group. What constitutes a case depends on the type of case study you do which will be discussed later in this paper.

Multiple case study research is a qualitative methodology that allows researchers to contrast between individual cases, represent a diversity of qualities and extremes to create depth, and understand a broad phenomenon without losing the individuality of the single case studies (Baxter & Jack, 2008; Thomas, 2011). Multiple case study is the intentional analysis of two or more complete single case reports (Stake, 1995). When well-selected and crafted, researchers can use multiple case study to increase external validity and generalizability of their single case study findings (Merriam, 1998). Although multiple case study is well-suited for counseling and CE research, it has been underutilized to date and as such, we explore the promise of multiple case study, provide practical resources on single case study research as the foundation of a multiple case study, and highlight concrete implications for use of multiple case study design in counseling and CE research.

Case study researchers aim to gain a holistic understanding of a phenomenon by investigating complex systems not easily isolated from their context and impossible to study with other research methods (Dillman Taylor, & Blount, 2021; Yanzan, 2015). Single and multiple case study are a natural fit for counseling researchers given our focus on the complexity of identity, culture, and historical events as they pertain to client wellness. Additionally, counselor educators are often aiming to capture the complexity of classroom and program dynamics that are not easily isolated from the context of the time and place. This methodology allows counseling researchers to gain an in depth understanding of clients, students, classrooms, and community phenomena. Though this methodology has been utilized periodically by counseling and counselor education researchers (Dillman Taylor et al., 2017), it often remains misunderstood and confused for case illustrations or case examples in theoretical and conceptual articles. Clarification via a thorough etiological review and explanation may address those misconceptions.

This article begins with information about case study scholars and moves into discussions about single and multiple case study methodologies. Finally, implications for case study use within professional counseling and counselor education are provided. Though there are textbooks that attend to various aspects of single or multiple case study design, there are none specific to counseling research which is unique in its aim to capture the complexities of wellness, counseling technique, pedagogy, and supervision. Furthermore, there are no exemplar articles clearly articulating how to meaningfully integrate the work of multiple case study scholars. The authors aim to fill these gaps by consolidating, integrating, and showing concrete application for best practices of this methodology in the field of professional counseling and counselor education.

Philosophical Variation

A well thought out qualitative research inquiry begins with an understanding of the paradigm, ontological assumptions, and epistemological perspectives that align with the methodology (Dillman Taylor & Blount, 2021). The first step in constructing a rigorous multiple case research study is to understand the ontological and epistemological paradigm of the researcher whose methodology we hope to use. The ontology, epistemology, and methodology should all be aligned and will dictate the specific methods used for data collection and analysis. In case study research there are three prominent scholars that escribe to different paradigmatic perspectives: Yin (1994), Merriam (1988), and Stake (1995).

Yin

Yin is considered a positivist case study scholar because of his use of primarily quantitative methods (Yazan, 2015). From a positivist perspective, researchers are operating under the assumption that there is a "single identifiable reality...a single truth that can be measured and studied" in the search for new knowledge (Lincoln et al., 2011, p. 102). Additionally, he urged researchers to use language such as *reliability* and *validity* that are typically reserved for quantitative scholars (Yin, 2017).

Yin believed that this single truth could be found if researchers were meticulous in their approach to ensure uniformity and coherence while providing logical explanations for every decision in the research process. This rigid process aligns with the positivist epistemological paradigm, which aims for absolute objectivity. This objectivity is found through constructing a research study with: (a) the study's questions, (b) propositions, (c) unit(s) of analysis, (d) linking data to the propositions, and (e) criteria for interpreting the findings. From Yin's (2017) perspective, case study design is grounded in theoretical propositions which were established prior to starting the research investigation. Finally, Yin (2017) outlined six sources of data for rigorous case study research: (a) documentation, (b) archival records, (c)interviews, (d) direct observations, (e)participant observation, (f) physical artifacts. Yin believed that in analyzing data, researchers must be competent in both qualitative and quantitative research methods. Through formal and systematic analytic methods such as standardized assessments, Yin (2017) postulated that researchers could discover objective truths about their case and establish internal and external validity.

The methodology Yin described is akin to the scientific method which has been conventionally utilized in the hard sciences (Merriam, 1991; Schwant, 2007). This makes Yinian case study ideal for program evaluation or other forms of inquiry that require justification to stakeholders who may expect a rigid research protocol presented prior to beginning inquiry. For counselor education programs this type of case study could aid in program evaluation, climate studies, or collecting data on specific courses in the program to report information to stakeholders that are primarily interested in quantitative or mixed methods data. For professional counselors this type of case study could be ideal for community mental health agency program evaluation, grant reporting, and multisite protocol outcome studies. As with all primarily quantitative research, it is important that the researcher reflect on what inherent bias is present in their assessment measures and research method, and intentionally embed steps to mitigate that bias.

Merriam

Merriam's worldview aligned with the constructivist paradigm, with the belief that reality was based on how individuals interacted with their "social worlds" (1998, p. 6). Through this paradigm individuals believe that there are a multitude of realities that exist and are integrally intertwined (Lincoln et al., 2011) and researchers attempt to understand meanings people construct through interaction (Yanzan, 2015). With a growing emphasis on reflexivity, cultural humility, and the co-creation of knowledge in counselor education, Merriam's constructivist roots allow for more flexibility in capturing and elevating the variation. Merriam believed that "the single most defining characteristic of case study research lies in delimiting the object of study, the case" (1998, p. 27). Thus, bounding the case and defining it as a specific single entity is essential for scholars utilizing Merriam's style of case study research. From Merriam's perspective, researchers investigate the boundedness of a case by asking if there is a finite: (a) number of people, (b) amount of time, or (c) data for collection, either theoretically or actually, and if the answer is yes, then there is a boundary to the case. Counselor education classes have a specific number of students, time that they meet, assignments introduced through a syllabus, and a specified beginning and end. For professional counselors the natural boundness of the 50-minute counseling session or a protocol with distinct time boundaries would be a good fit for this methodology. The bounds of the case as described by Merriam are clearly articulated in these cases. That would make this type of case study attractive to counselor educators wanting to look at learning and assessment in the classroom, or professional counselor aiming to understand the impact of a specific intervention or program.

Merriam believed that any method of data collection and analysis was appropriate from interviewing to testing. Although any method could be used, qualitative methods are typically used more often because researchers tend to use case study methodology to uncover deeper understanding of phenomena rather than for hypothesis testing (Merriam, 1998). From this perspective, the uniqueness of case study as a methodology is not necessarily in the methods of data collection and analysis, but in the questions that are asked about the case and their relationship to the end product (Merriam, 1998). Merriam (1998) recommended that researchers first conduct in-depth literature reviews to serve as a framework for design and suggested using a linear process that proceeds as follows: establishing a theoretical framework, creating research questions, and purposefully selecting a sample. Counselor education doctoral students may find this appealing since Merriam's method parallels the expectations of the traditional five-chapter doctoral dissertation. Additionally, since Merriam's type of case study requires clear boundaries, a classroom or traditional counseling session is a natural fit.

Stake

Stake believed that all qualitative researchers should approach their work from a constructivist and existential viewpoint where knowledge is constructed rather than uncovered (Stake, 1995). From a Stakian viewpoint, researchers gather interpretations from cases and expect that readers will also have their interpretations of the information presented. In this way, Stake's perspective is similar to Merriam's, except he further acknowledged that researchers and cases co-create or construct *truth*, and readers also construct separate *truths*. Stake's perspective supports the concept that there is no absolute fact or law that can be established through case study methodology. From this vantage point "there are multiple perspectives or views of the case that need to be represented, but there is no way to establish, beyond contention, the best view" (Stake, 1995, p. 108). This type of existential constructivist philosophy embedded into the methodology allows for more flexibility in elevating historically excluded voices and takes power away from the research as the arbiter of absolute truth. Counselor educators using this type of case study will most likely also resonate with critical research methods and community action-based research where the co-creation of knowledge is not just fostered but is a primary aim of the research.

Stakian case study research is distinct from any other type of research in four specific ways: (a) is more concrete and thus the knowledge resonates with our experience because of the vivid nature of description, (b) contextualizes experiences and aligns with human experience in ways other methodologies lack, (c) encourages readers to use their own experiences and develop their own interpretations of cases (Stake, 1981), and (d) provides clearer reference populations so readers can determine which populations and situations are most appropriate for generalization of information (Merriam, 1988; Stake, 1981).

Stake did not believe that there was a clear delineation when data collection should end, and data analysis begin. Further, he did not believe that quantitative methods were appropriate for case study methodology. Data collection methods are much less defined in Stakian case study, with most data being collected informationally through the impressions the researcher gathers from the case (Stake, 1995). Due to this ambiguity, Stake emphasized researchers’ skillsets as central to constructing and executing effective case study inquiry. Aligning with the fluid nature of data collection methods, Stakian data analysis mostly relies on researchers’ interpretations during simultaneous data collection and analysis. Although the primary data analysis tool is researchers’ intuition, researchers can use theoretical frameworks to minimize misinterpretations (Stake, 1995). Although Stakian design may be appealing to novice counseling researchers who are looking for flexibility in data collection and analysis, this design is challenging to manage due to a lack of boundaries and heavy reliance on researcher intuition.

The philosophical variation presented in this section is both a strength and an initial choice point for counselor educators and students wishing to use this type of research methodology. The data collection, analysis methods, and types of truth the author is seeking all must be considered prior to starting the research. None of the three types of case study presented are incorrect, but the strength of the research rests on the researcher reflecting on their own philosophical understanding of knowledge and truth, and the desired aim of the research study.

Multiple Case Study Methodology

To make an informed decision on which design is most appropriate for their inquiry, researchers must understand the paradigmatic and procedural differences in case study methods. Many textbooks provide step-by-step instructions on Yinian case study, making it relatively clear to articulate and replicate; this is one reason Yin (2017) believed his form of case study was best for program evaluation. Moving beyond Yinian case study methodology, this article focuses on how counselors can use a blend of Merriam's and Stake's methodologies to conduct rigorous multiple case studies. Currently, there are no textbooks or articles clearly defining how counselors can combine these methods in a strategic way to build a rigorous study. We begin by describing how to build a single case study before creating multiple case study design.

Single Case Study

Single case studies begin with identifying a theoretical framework, conducting a literature review, and identifying the research problem (Merriam, 1988). As researchers move between these tasks, they create a firm foundation to inform the remainder of the research process. The theoretical framework is unique to the researchers' orientation or perspective and thus will inform the trajectory of the inquiry. A theoretic frame could be a teaching theory such a Finks Significant Learning Taxonomy or Blooms Taxonomy, a counseling theory such as Person-Center Theory, or a wellness theory. Through the framework of the study, researchers draw on a variety of concepts rooted counseling including vocabulary, theorists, models, concepts, and terms from the specific domain. Researchers use these concepts to generate the research problem and questions, guide data collection and analysis techniques and interpret findings (Merriam, 1988).

Merriam (1988) postulated that a thorough review of the literature is an essential component of any case study. A theoretical frame grounded within a literature review decreases researcher influences due to grounding the study in literature from the field instead of the researcher's personal beliefs. Once researchers have a thorough understanding of their theoretical frame and how is it represented in the literature, they can then move on to creating research questions. Case study research most effectively answer “how” and “why” research questions (Merriam, 1988; Stake, 1998). Such as: *how do recorded lectures impact the learning environment in counseling theories course? Why do practicum counseling students soften their language when asking clients about suicide?* These examples could be easily translated to professional counseling with research questions such as: *how does telehealth impact the experience of clients in EMDR therapy? Why do clients terminate counseling early?*

After research question(s) have been created, researchers can move on to identifying the case that will generate the most complete source of data for the inquiry. For an in-depth description of the process of selecting and developing case study research, please refer to Dillman, Taylor, and Blount (2021). For an abbreviated version of developing a case study, we highlight the steps below.

Identifying the Case

The first step to identifying the case is to determine what setting, population, and/or phenomenon will most fully answer the research questions. For every research question, there are a variety of settings or populations that could be used to help researchers better understand the inquiry. Practical questions need to be addressed such as: *How easy is it to access this population?; What is my time frame, and will I be able to get access within that time frame?; What setting or population will provide me the clearest picture of the phenomenon I want to study?; and Are there any ethical or legal implications I need to consider while selecting my case?* Questions of confidentiality, power imbalances within the counseling relationship or the counselor education classroom, and the compensation of research participates are all important ethical and legal implications that should be thoroughly explored while identifying the case. This is especially important for counselors and counselor educators due to the nature of the work we do with students and with clients. These questions set the stage for selecting the unit of analysis (Merriam, 1998). Purposeful (Patton, 1990) sampling is the most common type of sampling because it allows researchers to choose a "information-rich cases" (Patton, 1990, p. 169) "from which the most can be learned" (Merriam, 1998, p. 61).

Continuing from the example research questions provided in the previous section, the first CE research question example seems obvious that the case would be a counseling theories classroom, but it could also be the instructor of a counseling theories class or a single student in a counseling theories class. For the second example research question the counseling researcher could choose a single practicum student as their case, a class of practicum students, or a counseling site that practicum students see clients at.

After researchers have identified potential cases, the next step is to identify the binding of each case. Merriam (1998) recommended using cases with natural bindings. Natural boundaries include time, space, quantity, place, activity or any combination. An example of a case binding is a classroom environment. The classroom has a finite number of students in it, a finite length for instruction time, and a finite amount of data (e.g., assignments, observation time, surveys to students or the instructor). Counseling researchers must define the bounds of cases to keep within scope and develop depth without stretching too thin. Binding a case also allows researchers to keep the focal point on the area of interest and surrounding context without getting lost in the vast amount of available data.

Data Collection

Data collection method should align with the theoretical framework and case study scholar of focus. As stated previously, Yin (2017) believed in the need to use both qualitative and quantitative data sources with reliance primarily on quantitative; Merriam (1988) relied primarily on qualitative but utilized quantitative with a justification that it was necessary for the specific inquiry; and Stake believed in the use of only qualitative data sources (Stake, 1995; 2006). This distinction is important, because the data that researchers collect must align with their perspective on the *nature of knowledge* (Lincoln et al., 2011). Collecting quantitative data aligns with a positivist/post- positivist perspective, while collection of qualitative data aligns with a constructivist paradigm. Choosing appropriate data sources is an important juncture for ensuring paradigmatic continuity.

Data sources can include documentation, archival records, interviews, direct observation (live or recorded), participant observations, physical artifacts, and researcher intuition (Dillman Taylor and Blount, 2021). Data sources are dependent on the setting and the phenomenon being studied, with researchers typically using one data source as the primary method with secondary methods to create more depth of understanding. In the field of counselor education and professional counseling data sources could include classroom materials, clinical notes, interviews with students or clients, counseling interventions, and student or client demographic information. Interviews are the most common form of data collection in qualitative studies in education and counselor education (CE) and could easily be integrated as a data collection method in a case study.

The case study paradigm will also dictate when researchers move from data collection to data analysis. From Yin's perspective the protocol is clearly stated prior to the study beginning, often including a pilot to ensure that data collection, analysis, and reporting were planned out accordingly. Once data are collected, planned data analysis begins (Yin, 2017). From Merriam's (1998) perspective, researchers must remain open to the possibility that data collection is cyclical, and researchers may need additional data sources to gain a more holistic understanding as data collection progresses (Merriam, 1998). Much like Stake, Merriam (1998) believed that data collection and data analysis were interactive with researchers using intuition and tentative hypotheses to guide their next steps. Furthermore, the simultaneous nature of data collection and analysis aligns with the emergent and constructivist perspectives of Merriam and Stake who believed there was no way to know who every person that needs to be interviewed is, or every question that needs to be asked prior to the study beginning. From this perspective, once the data collection has begun, so must data analysis.

Data Analysis

Case study utilizes multiple data collection and analysis methods depending on the specific inquiry, and there is not a single way to analyze data in case study research. Researchers can use ethnographic analysis, narrative analysis, phenomenological analysis, content analysis, analytic induction, and constant comparative methods to analyze data. All these data methods are popular in counseling and counselor education research. Marriam (1998) detailed each of these methods and addressed the advantages of analyzing and collecting data concurrently as it pertains to each method. Photovoice, discourse analysis, genre analysis, and interpretative phenomenological analysis may all be suitable data analysis methods, depending on the type of data involved. Marriam (1998) went so far as to state that there are very few right and wrong ways to conduct qualitative case study research and analyzing data during collection may be the only aspect of this research that researchers must do for it to be right. Finally, the overall aim of single case study research is to understand the phenomena in great depth within context. Thus, researchers must zoom in and zoom out to make sure that they are collecting data from multiple areas of the context impacting the phenomena.

Reporting Findings

The single case report can take on many forms, but typically includes a combination of contextual information (demographics, setting, relationship of the researcher to the settings), research questions, data sources collected, results of systematic analysis of each data source, and a cohesive interpretation of how data sources and context create a better understanding of the phenomenon as a whole (Dillman Taylor & Blount, 2021). Multiple data sources ensure triangulation in the case report which minimized the chances for misinterpretation by the researcher or the reader (Stake, 2006). Triangulation is any method employed by the researcher during data analysis that utilizes multiple perspectives to clarify meaning or verifies repeatability of an observation or interpretation. Specifically, the multiple data sources in case study research allow for the researcher to triangulate themes through verification of multiple sources (Stake, 2006). The robustness of the case report, number of data sources, rigorous and appropriate data analysis methods used for each source and use of member-checking are all ways to increase trustworthiness in single case study research. Once all single case studies are completed, multiple case study cross-case analysis can begin.

Multiple Case Study

Researchers use multiple case study to contrast between cases and offer a rich understanding of *the how* (Baxter & Jack, 2008). In a multiple case study, researchers complete a *cross-case analysis*, which is the comparative dynamic of multiple cases, to better understand aggregate data based on the binding issue of the single cases (Stake, 2006). If the intention is to complete a multiple case study with the single case reports, it is important that the same data sources are collected across each case to complete a cross-case analysis. Further, when analyzing data with the intention of using results for a multiple case study cross-case analysis, researchers must identify individual themes in each single case that are grounded in the research questions. It is important to keep systematic notes for each individual case which will be referenced during the cross-case analysis (Stake, 2006). A systematic analysis of the single cases will allow for a rigorous systematic analysis of the multiple cases. This process begins with intentional single case selection.

Researchers must select single cases that will be used in a cross-case analysis with a primary aim of capturing enough variation to create depth while having sufficiently similar to analyze across cases. Selection can include cases that represent a range in interest, qualities, extremes, or ideal types to generate depth in similar and contrast that can illuminate phenomena without losing the uniqueness of each case. Stake (2006) referred to the binding issue as the *Quintain* (pronounced kwin'ton). The Quintain is a shared characteristic or condition identified by researchers prior to conducting single case studies (Stake, 2006). When researchers select cases for their study, they are looking for cases that display the condition, characteristic, or phenomena so they can examine similarities and differences across context to better understand the Quintain.

An example of a Quintain is *trauma courses intended for master's level graduate students in counselor education* (Adams, 2019). To better understand this Quintain, Adams (2019) had multiple single case studies examining different trauma courses in counselor education, allowing her to examine similarities and differences. Another example is *conduct disorder in male residents in treatment facilities.* In this instance, the single cases could include each resident and would be utilized to better understand the phenomenon as a whole. In these two examples, the

Quintain seems relatively clear. In many cases, the Quintain will be less of a clear picture and more of a cluster of puzzle pieces that fit together within the cross-case analysis (Stake, 2006).

Analysis

Cross-case analysis begins by reading the analyzed single-case reports and reviewing notes taken by researchers throughout the analysis process. Typically, individual case data are not re-analyzed, and no new data are collected for multiple case study analysis. If researchers have analyzed single case studies meticulously, the case reports should include all information necessary to complete the cross-case analysis. In some instances, researchers may need to go back to the raw data to find a quote or clarification, but the aim is to apply information in single case reports to the theme-based description of the Quintain (Adams, 2019; Merriam, 1998; Stake, 2006).

Stake (2006) suggested outlining the themes of the Quintain which should directly align with the research questions. This is also an ideal time to revisit the theoretical framework. For example, if the Quintain is student wellness in counselor education programs, the theoretical frame could be a wellness model. The themes of this Quintain will align directly with the various aspects of the wellness model the research chooses.

Although multiple researchers may be involved in the single case study data collection, Stake (2006) recommended that a single individual should complete the multiple case study report. Looking at reports side-by-side should allow the researcher to contextualize information that was collected in one case and not another, or a data source that was utilized in one case and not another. If these data were collected for individual cases but not included in the case report, it can be added to the cross-case analysis. The counselor researcher can go back to the raw data from that individual report, analyze it, and integrate it into the cross-case analysis. This ensures that consistent data points were collected across all the cases. If data were not collected at all, that should be noted or captured during member-checking if appropriate. Looking at reports side-by-side, the researcher should begin to note where Quintain themes were represented in each case and begin to map the representation of these themes in each case. See Stake (2006) for helpful worksheets outlining this process.

After the researcher understands the broad representation of each theme in the individual cases, they code for specific findings in the case reports that support these themes and collapse them into clusters based on similarities (Stake, 2006). It may be helpful to write each interpretation or finding from individual cases on index cards with a notation of the original case, then sorting those cards based on similarities (Adams, 2019). Contradictory findings involving the same topic should also be sorted into the same group. Then, the researcher identifies clusters with the strongest support from the individual cases and names the *Merged Finding*; not all individual case findings need to be merged. Researchers then consider how the Merged Findings relate to the Quintain, organizing findings from those that relate most to least. The Merged Findings that relate most to the Quintain themes are called *Assertions*, or the conclusions that one can draw about the Quintain from the Merged Findings in individual cases. To make Assertions, the researcher needs concrete information from each case (e.g., quotes, writing, photos, audio) that align with the Quintain themes. All Assertions should represent multiple case findings with supportive evidence from each case (Stake, 2006). After the Assertions are formed and the supportive information is organized and collected, the researcher can begin creating the report.

In this process the themes are both generated prior to the analysis and have an opportunity to emerge from the data. The researcher will have a set of themes that align with the Quintain, but while analyzing the reports side by side may find themes that where not originally identified as a component of the Quintain. For example, Adams (2019) used multiple case study to explore trauma education in counselor education programs. The author originally identified the themes that aligned with the theorical framework: teaching and learning activities; and assessment and feedback. These themes aligned with the theoretical frame which was a learning theory and tied directly to the Quintain which was “trauma courses intended for master’s level graduate students in counselor education”. In the coding of the single case reports, other factors came up that impacted trauma education including instructor identity and instructor role, which weren’t originally identified as part of the theorical frame or as an obvious part of the Quintain.

Report

Much like the single case report, the multiple case report is a consolidation of the vast amount of data in the single case reports. This case report is a space to consolidate and make meaning of all information collected from various sources (Merriam, 1998). The report should include a clear outline of the problem including literature, theoretical frame, research questions, and purpose of the study. Additionally, the report must include a short description of relevant demographic information from each of single case report so the reader can understand the information in context (Merriam, 1988). Stake (2006) strongly believed that the researcher should spend a significant amount of time describing the context of the case. This description should include the sample, data sources, and pertinent demographic information. The report should include quotes, images, and other artifacts from all the single case studies that can help the reader make sense of the whole and support the findings. Finally, like any rigorous qualitative research, the case report should include a positionality statement detailing the researcher’s philosophical orientation and potential bias (Johnson-Bailey, 2015). Multiple case study research can offer a tremendous amount of depth and breadth; to engage in that type of inquiry, the researcher must manage three primary challenges (a) volume of data, (b) time, (c) and integrity.

Challenges with Multiple Case Study Method

Multiple case study is ideal for gaining a better understanding of complex systems that cannot be easily isolated from their context (Merriam, 1998). The same aspects of case study that make it appealing also create complex problems that can take significant amounts of time, energy, and resources to manage if they are not accounted for at the beginning of the study (Adams, 2019). These issues include integrity of the researcher, volume of data, and time management.

As with all qualitative research, the researcher is the primary tool for data collection (Creswell, 2013; Merriam, 1998). In case study research, the researcher must decide which questions to ask, which data to collect, and how to organize the information into a cohesive gestalt. There is no way to include all the information collected from the sample, so it is the researcher's discretion on which information is most pertinent to the research questions (Lincoln, et al., 2011). From Stake's (2006) perspective, research institution is a primary source of data in case study research; the researcher's intuition influences when data collection shifts to data analysis and when enough data has been collected and analyzed to begin the case report. Case study researchers can engage in steps to increase rigor, including using multiple in-depth interviews with the same individual(s), using multiple data collection points (e.g., interview, focus group, document analysis, journal analysis, artifact analysis, etc.), employing multiple rounds of data collection overtime with the same case (i.e., longitudinal investigations) (Dillman Taylor & Blount, 2021). Member-checking, positionality statements, researcher memoing, and data triangulation are all ways to help manage researcher bias and increase methodological rigor.

Ultimately, ethical case study researchers paint a holistic picture of the case including those aspects that aligned with and those that may diverge from the interests of the researcher.

The best way to manage the large amount of data, especially when collecting from multiple sites for a multiple case study, is to work as a team (Stake, 2006). Research teams manage information for a particular case, with regular meetings across sites and ensure everyone is on the same page. Data organization, labeling, and consistent storage are key to maintaining organization. All artifact information for a particular case needs to be kept with the case, and careful project management will ensure all data are being analyzed correctly.

Case study research often requires substantial amounts of time to collect, analyze, and organize data. The researcher and their team are essentially doing separate research studies for each individual case; then they conduct an additional analysis of each individual case to create the multiple cross-case report. There are also multiple types of analysis happening throughout the study, which could require researchers to move a little more cautiously to ensure they are following the proper protocol for each analysis. To keep the study organized, researchers may stagger multiple steps, delaying one part of analysis or collection often until another part is complete. This limits how quickly the study can be completed because the team is reliant on the speed of data collection, participant responsiveness, and researcher capacity to analyze data. Case study and multiple case study research can provide great depth and breadth, and time put into organization will help researchers mitigate these challenges.

Implications

Case study is particularly helpful when studying “how” and “why” questions (Yin, 1944) or when one has a particular interest in process (Merriam, 1998). Case research is also extremely useful in situations where researchers have little control over events or variables impacting the phenomena or if situational factors are impossible to fully understand ahead of time (Marriam,1998). Case studies offer a closeness to the phenomena of interest, with researchers using observation, interviews, and multiple data sources. This makes case study and multiple case study a particularly useful methodology for counseling students, counselor educators, and professional counselors (Dillman Taylor & Blount, 2021).

Case study research is particularly fitting for counseling because we often have a desire to develop a deep understanding of a phenomenon (Dillman Taylor & Blount, 2021). Furthermore, we have a developmental responsibility to thoroughly understand individuals across bio-psycho-social contexts (ACA, 2014). As such, students may find case study or multiple case study of interest for a thesis or dissertation. Further, using case analysis can help students paint a more holistic picture of their clients' experiences. Reyes (2007) used multiple case study in a dissertation focused on bettering understand counselors addressing culture in marriage and family therapy. In 2017, Rectanus published a multiple case study dissertation focused on assessment trauma-focused counselor competency. Additionally, the first author completed a dissertation focused on teaching about trauma in counselor education. Each of these case investigations used different forms of data collection and analysis to fit specific inquiries and demonstrate the feasibility and usefulness of this methodology in understanding complex issues in counseling and counselor education.

Case study has been a large part of education and social science research for many years. The Council for Accreditation of Counseling and Related Educational Programs (CACREP, 2016) requires doctoral students to learn methodologies relevant to furthering the counseling profession. Educators have a responsibility to ethically and rigorously conduct research in understanding programs, policies, techniques, and specific populations within the counseling profession

(Merriam, 1998). Case study research is ideal for applied settings, including education and counseling. Researchers have used multiple case study to better understand high school education for children with intellectual disabilities (Dore et al., 2002), and educator satisfaction for high school band teachers (Shaw, 2014). Counselor educators could utilize case research to assess a plethora of themes, such as how students acquire counseling skills and gain multicultural awareness and knowledge (see Dillman Taylor et al., 2017). Adams (2019) demonstrated this by utilizing multiple case study to understand teaching trauma in counselor education.

Like students and counselor educators, professional counselors can benefit from conducting and consuming quality case study research. Professional counselors are often in the front lines working with clients and tend to be consumers of research and outcome research, rather than conductors. Multiple case study design has been used to better understand phenomena particularly relevant to counselors. These include studies of non-suicidal self-injury (Wester et al., 2016), narratives of adaptation and resistance in immigrant women (Yakushko & Morgan-Consoli, 2014), individuals who are mentally ill and homeless (Helfrich et al., 2014), the supervision alliance (Burke et al., 1998), trauma-focused counselor competency (Rectanus, 2017), and resiliency in adult children of divorce (Thomas, 2009). Additionally, helping professionals have utilized case research in psychology to better understanding service delivery for victims of rape (Campbell & Ahrens, 1998) and child development related to coordination disorders (Miyahara & Wafer, 2004). Integrating case study and multiple case study into the preparation of professional counselors could provide them with the knowledge they need to perform this type of inquiry once they get into the field. Multiple case study is a valuable way for them to critically analyze and report what they are seeing in their counseling sessions for the benefit of the profession.

Conclusion

Case study research is a robust way to examine the “how” and “why” of complex phenomena within context. Case research has been demonstrated useful in both the literature but has been underutilized compared to other research methodologies to date (Dillman Taylor & Blount, 2021). The foundations of our understanding of psychological phenomena began with scholars presenting in depth case studies of their clients for the scientific community. The counseling profession benefits from having robust understandings of human behavior and phenomena related to the human capacity. As such, counselors are prime candidates for utilizing case research to understand human behaviors in in-depth, holistic ways that may help them make empirically sound decisions about treatment and counseling interventions.

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