Creating a Case Study: A Brief Introduction from the Pluralism Project

Before you begin researching and writing a case study, please refer to the sample cases and additional materials we’ll provide from the Harvard Business School (HBS) and other sources on case writing and teaching.

**Topic and Protagonist**

The first step in developing a case is identifying the topic: is there a controversy, dilemma, or decision that is emblematic of a broader issue in American religious communities today? Does it have sufficient tension to engage the reader? Will it enable the reader to learn more about a faith community and/or interfaith relations? Does it involve compelling civic and/or theological issues? Would the topic lend itself to critical thinking? How relevant is this issue? What are the take-aways or teaching points?

When seeking a topic, one helpful method has been simply to ask those in religious or civic leadership positions about a recent dilemma or dispute related that proved particularly challenging. Or, have a conversation with a local religious or interfaith leader about the sorts of issues that have taken place in the area. Religious Diversity News (http://www.pluralism.org/news) has an extensive searchable collection of news articles; reading through this resource will be useful in the identification of conflicts or issues that appear to recur, and may be more worthy of exploration.

Quite often, a case writer may find that they have to change their topic after a few days or weeks of research. The reasons have included: lack of access or responsiveness from subjects; too much, or too little, complexity; pending lawsuits, or other issues of the case that are still unfolding; and, media coverage which presented the details of a case incorrectly, to name just a few. While this may be frustrating, the process will help refine your thinking and research for the next topic.

The second step in developing a case is selecting a protagonist, the case’s principal character. S/he should be integrally involved in the decision-making, as the story will be told from this point of view. Try to consider – and speak with – a range of possible protagonists before selecting one. Will you have access to this person? Will they be able to speak candidly about the issues? Are they relatable? You may want to select more than one possible protagonist, and choose one after conducting research and interviews.

In some instances a protagonist may be reluctant to be named in a case. While you may use a pseudonym to refer to the protagonist and/or create a fictionalized version of the case, it may be better to choose another case or protagonist. Thus far, we find that religion cases seem to require the specificity of a real event and the authenticity of personal experience. (Many cases describing real events may already seem unbelievable, such as when Palos Heights offered a Muslim community $200,000 to walk away from a real estate deal.) If a protagonist requests anonymity, please speak with us about how to properly protect their identity.
The power of the protagonist is that this voice and perspective provides the reader with an entry point and a sense of identification with the issues at hand. Through the protagonist, the reader is asked: “What interests is she trying to balance? Why is it difficult? How would you evaluate her choice? What other options does she have? Faced with a complex situation, where can she seek resources?” In order to provide the opportunity for readers to hear the voice of the protagonist, the case writer must be mindful about minimizing his/her own voice.

As you tell the story from the point of view of the protagonist, your case should be suggestive of other points of view. This can be challenging, and is perhaps one of the most difficult aspects of applying the case method to religion and theology. The notion of the sole decision-maker resonates more in business learning than it does in the humanities, which places a greater emphasis on the leader in the context of a community and on the importance of multi-vocality. Accordingly, in addition to the protagonist, you may need to interview people with other perspectives on the case.

**Research and Interviewing**

Whenever possible, you should plan to conduct a detailed interview with the protagonist and visit the setting of the case. The case should not merely be a retelling from a series of newspaper articles. Ideally, the interview and field visit will help you to create a compelling character and situate the controversy within its unique context.

Research on the case will include Lexis-Nexis searches for news articles, web searches for information about any relevant religious centers and community information, and other background research. This will enable you to construct a basic timeline of events and to compile a list of interview questions.

A note about field visits and interviews: please remember to respect the time and expertise of all interview subjects. Be prepared and polite. The initial contact should briefly provide information on the case initiative, your role, and your interest in speaking with them about the case. Early on in the communication, advise any interview subjects that you will provide them questions in advance and will give them an opportunity to review transcripts and cases for accuracy. This can be a delicate balance, but in order to facilitate candid conversations and reflections, the person being interviewed needs to trust that they won’t be misquoted or misrepresented. While we often refer to the people we speak with in research as “interview subjects,” we should consider them as participants in the project.

The interview should enable the subject to reflect upon the controversy or dilemma-- and decision-making process-- as it was happening *at the time*. While other reflections are interesting, and may be useful for a B case conclusion on “lessons learned,” the core of the conversation should be what the subject did at the time and felt at the time, based on the information available to him/her at the time. It is helpful to review the timeline of events during the interview, both as a means to insure accuracy and to structure the events chronologically.
As in any interview, open-ended questions are best. (Example: “Please describe your reaction when you learned that the neighbors were opposing the new temple.” Not: “Were you upset when the neighbors opposed the new temple?”) Open-ended questions are less leading, and less likely to result in a one-word answer.

During the field visit and interview, be sure to take extensive and descriptive notes. What is unique about the setting? What is distinctive about the interview subject? What makes them memorable? Jot down what you see and hear – either in the margins of your notes or immediately after an interview or site visit. Ask your interview subject to describe feelings, places, and events.

Request permission to record the interview. If you are granted permission, be sure to check that the recorder is functioning well before you go on site, and do a sound check at the beginning of the interview where you ask the subject to say his or her name, title, and the date of the interview. Make sure that your voices are audible; this may be particularly important when interviewing non-native speakers. Plan to take basic notes as you speak, even if the interview is being recorded.

A good set of interview questions is critical (see below). Plan to provide a set of well-developed questions to the subject before the interview, based on your research to date. Print out two copies for use at the interview: one for you and one for the subject. You may not need to ask all of the prepared questions; rather, your conversation should be dynamic and organic, with new questions emerging as you discuss the case. You might put important questions in **bold** so that, in the midst of the interview, you don’t miss key points. If you are not able to record the interview, it will be important to do additional preparation: format your questionnaire with extra spaces after each question for notes and quotes; this way, it will be easier to reconstruct the context after the interview.

Immediately after the interview, review your notes and tapes. Your memory will fade quickly over the days and weeks after the interview. If it is possible to transcribe your interview within the next week, that is ideal. Your transcription can begin with the interview questions, although what you say as the interviewee need not be transcribed verbatim. While it is preferable to transcribe the entire interview, this may not always be feasible. A good method is to listen to the entire interview to get a sense of what may be most important, and which quotes are most important. Then, transcribe parts of the interview and make clear notes to distinguish those parts of the conversation that are paraphrased. It is a good idea to establish conventions that clarify this: put interview questions in italics, verbatim quotes within quotations, and paraphrased content in brackets.

The transcript should then be sent to the interview subject for review. Most subjects genuinely appreciate the opportunity to review the document and amend their quotations. Try to do your homework: don’t rely on others for spelling and other details, if possible. Spell-check the document before you send it out, and offer sincere thanks for their assistance. You may wish to provide a time frame for review: “If you are able to review
this within one week, and send me any corrections or changes, that would be very helpful. Please let me know if you have any questions or concerns. Thank you.”

Structure and Style

Read a number of case studies before you attempt to write one. Keep in mind what a case is – a description of a dilemma that engages students in critical thinking – and what it is not. The case study is designed to provoke reflection and conversation, not to suggest a path of action. It is not a research report or academic paper. Accordingly, you will also want to think more broadly about your use of research sources: personal correspondence from the protagonist, a bulletin from a place of worship involved in the case, or a video of an event relevant to the case are all far more useful than a journal article. If anything, case writing is more journalistic than academic. A case opens with a lead, and continues with clear, concise, and engaging prose. Yet it is not an opinion piece; as a case writer, you want to provide an opportunity for your readers to think critically and reach varied conclusions.

Keep close track of your use of outside sources, which should be compiled as endnotes. Please see other PP cases for formatting examples, and refer to the HBS style guide: http://www.library.hbs.edu/guides/citationguide.pdf

As you write and refine your case, refer to “Driven by Faith” as an example to follow: specifically, the first section is intended to introduce the protagonist and situate the dilemma. Then, section by section, the body of the case moves the reader through content that informs the dilemma by providing the wider context and other points of view. Finally, the case concludes at a decision point, which is also a point of tension: it is an expanded version of the initial dilemma presented in the opening. The B case is relatively brief. It begins by re-introducing the protagonist and the dilemma and continues by detailing the decision made and its impact.

The case should refer to characters by their last name only after the first reference. The one exception to this would be religious leaders who should retain their titles.

Write out the full name of a religious center or organization in the first occurrence, with any acronym in parentheses after the name. For readability, future references can utilize an acronym or short form when appropriate, such as “the Temple” or “Sri Lakshmi” rather than “Sri Lakshmi Temple Society of Massachusetts.”

Cases may vary considerably in length: some are one page; others are more than 60 pages. Your cases, ideally, would be no more than 8-10 pages total, single-spaced. Alternatively, you may develop two shorter cases of 3-5 pages each. Some case studies will benefit from having an “A” and a “B” case: the A case builds to the point of decision, the B case outlines what decision was made, and its impact.

Cases will often benefit from ancillary materials, which are often primary materials: a press release or a letter; a newspaper article; minutes from a meeting; or even a
supplementary interview. These materials may be particularly helpful for representing multiple points of view. Please refer to “Driven by Faith” and other Pluralism Project cases for examples of the range of ancillary materials that may be used to augment your case. If you need to reduce the length or complexity of the case narrative, consider if a section might be pulled and included as ancillary material.

The structure of the case is important: early on, construct a basic outline and identify what will be covered in the A & B cases. Don’t aim for perfect prose in your first draft; instead, you should aim for a sensible structure and useful teaching points. It may be helpful to draft the full case, with section headings, and then go through and edit for content, interest, and clarity.

The case should be organized into sections by topic, with headers. Each section should be able to stand alone; taken together -- topic by topic in rough chronology -- they build a case. Resist the urge to write in a typical research paper format. Section headings are the backbone of the case and should be used even in the earliest drafts (even placeholders section headings are helpful). In later drafts, each section should be edited down to no more than a few paragraphs. Just be sure to weave the protagonist’s voice and view into any relevant sections.

One of the biggest challenges in case writing is adhering to the convention of writing in the past tense. Read other cases to see how other writers use the tense, and review your document to be sure that the tense is consistent throughout. Be mindful of the past-tense pitfall: the passive voice. An example of passive voice: “The policy was approved by the committee.” The active voice: “The committee approved the policy.”

The maxim “show, don’t tell” is particularly applicable to case writing: find examples to illustrate a point; use rich description to develop character, setting, and tension. Aim to be suggestive, rather than didactic, so there is ample room for interpretation. As you write the case, make note of possible discussion questions, but be mindful to keep such questions --and your opinions-- out of the case narrative. A good case requires many versions, working and reworking the prose so it is clear, readable, and engaging, and cutting out any sections that are not critical for a reader’s understanding of the core issues.

As you are writing the case, think of it as a teaching tool. Keep possible discussion questions in mind, and make note of them. Being mindful of how the case might actually be used may help you make difficult decisions about what to include in the narrative.

Once you have a solid draft, send it to your interview subject(s) for review. Spell-check the document and read it closely before you send it out, and always offer sincere thanks for the assistance. Again, you may wish to provide a time frame for review: “If you are able to review this within the next week, and send me any corrections or changes, that would be very helpful. Please let me know if you have any questions or concerns. Thank you.” Often, you will catch errors this way; some subjects will request additional changes at this stage. The final case study should resonate for the subject: they should see
themselves in the protagonist and dilemmas as you’ve framed them. (If you have more than one well-developed character/interview subject in the case, you will have multiple reviewers.)

At this stage, please ask all interview subjects to sign and return the release form if you haven’t already. Depending on the circumstances, you may want to ask a subject to sign off on their interview transcript earlier in the process. Once you have integrated any changes and completed the release forms, please send thank you notes.

When you submit the case to Pluralism Project staff, be sure that the signed release forms include contact information for all interview subjects, with emails and phone numbers. If a subject has requested anonymity, please talk with Ellie Pierce about this procedure. If any subjects would like to receive a copy of the final case in PDF format, please make yourself a note to follow up once the Pluralism Project has finalized it.

**Example Case Study Interview Questions:**

Begin the interview by expressing thanks, and asking: “Did you have any questions about the materials I’ve sent, or about this process?”

The first few questions can be more biographical (name, age, title). Depending upon the person interviewed, you might ask: “What brought you to this area? Do you have any children? What do you enjoy most about your work in XYZ? What have been your greatest accomplishments? Your greatest challenges?”

Review the timeline of major events of the controversy, as you understand them. Ask the interview subject to let you know if there are any omissions or incorrect information. In some cases, it may be useful to send the timeline in advance of the interview. Ask: “What moments stand out for you? What was the most difficult moment?” For key moments, ask: “What do remember about that time? How did you feel? What did you do?”

Involve the interview subject in framing the dilemma: “Case studies often focus on the point of decision, or dilemma, for one of those involved in a controversy. In your own estimation, when did you feel [most acutely] confronted by a decision or dilemma? What was it? Was there more than one?”

Then, ask for details about what he or she remembers: “Take me back to that day…” “Where were you when you realized that you’d have to solve this problem? How did you feel?” “How did you describe this dilemma to your family/community? Who did you discuss it with at the time?”

*Other general questions that have proven helpful include:*

“Can you tell me a bit about [the religious community or organization]: how large is it? Is there anything that makes it unique?”
“How would you describe [the city or town] to one who had never visited? How does religion contribute to the character of the town? (How many mosques, gurdwaras, temples? What kinds of interfaith relations exist?)”

“When you were considering how to respond, what/whose interests were you considering? What were the risks or consequences?”

“Were there specific religious sources or principles you turned to in making the decision?”

“Did you have to talk to others about this? Were you concerned that some wouldn’t agree? How would/did you explain it to them?”

“How do you understand [the opposing point of view]?”

“At the time, did you feel as if there was a simple resolution to this controversy? Why or why not?”

“During the controversy, did anything surprise you?”

“Looking back, is there anything you would’ve done differently? What did you learn from this dispute/dilemma?”

“What would you hope others might learn from this?”

“What are your hopes for the future of [the community]?”

“Are there any aspects of this controversy that we did not discuss today that you think are important to understanding this case?”

Conclude by expressing appreciation for the interview subject’s time and noting that you’ll be in touch within the next two weeks for materials to review. Be sure to request, and provide, contact information. You should follow up with a written thank you note as well.