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Nataliia YEFREMOVA,

orcid.org/0000-0003-1476-1831

*Ph.D. in Philology, Associate Professor,
Associate Professor at the Conversational English Department
Lesya Ukrainka Volyn National University
(Lutsk, Ukraine) yefremova05@gmail.com*

Valentina BOICHUK,

orcid.org/0000-0002-9870-2195

*Ph.D. in Philology,
Senior Lecturer at the Department of Philology
The Municipal Higher Educational Institution "Lutsk Pedagogical College"
of the Volyn Regional Council
(Lutsk, Ukraine) boichukvalia@gmail.com*

Larysa RYS,

orcid.org/0000-0003-0775-9629

*Candidate of Philological Sciences, Associate Professor,
Associate Professor at the Department of German Philology
Lesya Ukrainka Volyn National University
(Lutsk, Ukraine) rys.larysa@vnu.edu.ua*

METHODOLOGY AND METHODS OF LINGUISTICS: CASE STUDY

The article highlights case study research as a vital and evolving method in linguistics, offering insights into the complex and contextualized nature of language phenomena. Despite inherent limitations regarding generalizability, case studies provide unparalleled depth of understanding that contributes significantly to theoretical development and practical applications in various fields of linguistics.

It is shown that in linguistic research, case studies typically focus on individual language learners, teachers, speakers, communities of practice, or specific linguistic situations. The survey shows main typologies of case study research, the understanding of which is crucial for designing a rigorous and purposeful linguistic inquiry. Robert Stake's intrinsic, instrumental, and collective cases, and Robert Yin's descriptive, exploratory, and explanatory case studies, highlight the method's flexibility and strategic alignment with diverse research objectives.

Qualitative approach and naturalistic inquiry serve as philosophical underpinnings, underlying basic methodological principles of case study research in linguistics, these being boundedness and singularity, in-depth investigation, multiple perspectives, contextual emphasis, and inductive reasoning.

The article dwells on the process of case study research in linguistics that encompasses careful research design, diverse data collection techniques, and rigorous qualitative data analysis. The analysis typically progresses through several stages: describing experience, describing meaning, focus of the analysis. Thematic analysis, discourse analysis, narrative analysis, and grounded theory are common qualitative data analysis methods particularly suited for linguistic case studies.

The future of case study research in linguistics depends on researchers' ability to balance methodological innovation with established principles of rigorous qualitative inquiry, ensuring that this approach continues to generate meaningful insights into the complex world of human linguistic behavior.

Key words: methodology, methodological principles, method, case study, linguistics, data analysis.

Наталія ЄФРЕМОВА,

orcid.org/0000-0003-1476-1831

кандидат філологічних наук, доцент,

доцент кафедри практики англійської мови

Волинського національного університету імені Лесі Українки

(Луцьк, Україна) *yefremova05@gmail.com*

Валентина БОЙЧУК,

orcid.org/0000-0002-9870-2195

кандидат філологічних наук,

старший викладач кафедри філології

Комунального закладу вищої освіти «Луцький педагогічний коледж» Волинської обласної ради

(Луцьк, Україна) *boichukvalia@gmail.com*

Лариса РИСЬ,

orcid.org/0000-0003-0775-9629

кандидат філологічних наук, доцент,

доцент кафедри німецької філології

Волинського національного університету імені Лесі Українки

(Луцьк, Україна) *rys.larysa@vnu.edu.ua*

МЕТОДОЛОГІЯ ТА МЕТОДИ ЛІНГВІСТИЧНИХ ДОСЛІДЖЕНЬ: КЕЙС-МЕТОД

У статті висвітлено особливості застосування кейс-методу як надзвичайно важливого методологічного інструментарію лінгвістичних досліджень, який пропонує унікальне розуміння складної, контекстуалізованої природи мовних явищ. Попри певні обмеження щодо процесу узагальнення, кейс-метод забезпечує достатню глибину розуміння явищ та процесів, що значною мірою сприяє його теоретичному розвитку та практичному застосуванню в різних галузях лінгвістики.

У лінгвістичних дослідженнях кейс-метод зазвичай застосовується для аналізу конкретних ситуацій чи проблем, пов'язаних з окремими особами, які вивчають мову, викладачами, носіями мови, або конкретними лінгводидактичними чи мовними/мовленнєвими/комунікативними ситуаціями. Пропонований огляд знайомить з основними типологіями кейс-методу, розуміння яких є вирішальним для розробки дизайну лінгвістичного дослідження. Внутрішні, інструментальні та колективні кейси Р. Стейка, а також описові, дослідницькі та пояснювальні кейси Р. Іня підкреслюють гнучкість методу та його стратегічну відповідність різноманітним дослідницьким цілям.

Якісний та натуралістичний підходи слугують філософськими підвалинами основних методологічних принципів дослідження кейсів у лінгвістиці. Ними є обмеженість та сингулярність, поглиблене дослідження, множинні перспективи, контекстуальність, індуктивне мислення.

У статті розглядається процес застосування кейс-методу в лінгвістиці, який охоплює ретельне планування дослідження, різноманітні методи збору даних та їхній якісний аналіз. Цей процес зазвичай проходить декілька етапів: опис конкретної ситуації, опис значення, власне аналіз. Тематичний аналіз, дискурс-аналіз, нарративний аналіз та обґрунтована теорія є методами якісного аналізу даних, суголосими з ситуаційними дослідженнями в лінгвістиці.

Майбутнє кейс-методу в лінгвістиці залежить від здатності дослідників віднайти рівновагу між методологічними інноваціями та усталеними принципами якісного дослідження, гарантуючи, що цей підхід продовжуватиме сприяти розумінню мовної/мовленнєвої поведінки людини.

Ключові слова: методологія, методологічні принципи, метод, кейс-метод, лінгвістика, аналіз даних.

Formulation of the problem. Case study research stands as a widely adopted and significant method within multiple fields, spanning disciplines such as business, criminology, education, medicine, psychology, sociology, anthropology, and social work. At its core, a case study is defined as a “detailed description and assessment of a specific situation in the real world created for the purpose of deriving generalizations and other insights from it” (Raikar, 2025).

It is an empirical inquiry that thoroughly investigates a contemporary phenomenon within

its real-life context. “Case study researchers aim to identify or attempt to identify the various interactive processes at work, to show how they affect the implementation of systems ...” (Bell, 2017: 10).

This approach is particularly salient when the boundaries between the phenomenon under investigation and its surrounding context are not distinctly evident, necessitating the use of multiple sources of evidence for a comprehensive understanding (Ellinger, McWhorter, 2016: 6–9). The objective of such research is to delve deeply into a

specific subject of analysis, thereby extrapolating key themes and results that can inform future trends, unveil previously obscured issues applicable to practice, or provide a profound means for understanding the subject. The purpose of case study research is dual: to furnish rich descriptive information and to suggest theoretical relevance, ultimately leading to a sharpened understanding of the specific case under study (Okowa, Otero, 2024: 1003–1009).

Within the domain of linguistics, case studies constitute a particularly valuable method, especially prominent in applied linguistics and language education. It proves instrumental in exploring the details of language evolution, change, and development, offering a nuanced and profound understanding of complex linguistic phenomena (Duff, 2008: 21–61).

The dual function of case studies positions them as a critical bridge between abstract linguistic theories and the complex, often multifaceted, realities of language use, learning, and change in real-world contexts. The explicit acknowledgment that this methodology is very powerful “for language researchers and for theory development in applied linguistics and language education” highlights its capacity to foster a more robust and relevant linguistic science (Okowa, Otero, 2024: 1003).

This research aims to investigate the specific adaptation and interpretation of the case study method within the field of linguistics. The specific **research objectives** are as follows: 1) to identify how linguistic phenomena are typically framed as cases; 2) to explore various typologies of case studies and their particular relevance and application to linguistic inquiry; 3) to determine philosophical underpinnings and core methodological principles of case study research in linguistics; 4) to describe methodological procedures for conducting a case study in linguistics,

Presenting the main research material. In linguistic research, cases are typically conceptualized as specific individuals, groups, or contexts where particular language practices or phenomena are prominent and can be investigated deeply. This can encompass a single person (e.g., a language learner, teacher, speaker, writer, or interlocutor), a small number of individuals within a group (e.g., a family, a class, a work team, or a community of practice). The process of bounding the case is crucial as it explicitly defines what is included within the scope of the study and what is excluded (Duff, 2014: 233–234). This deliberate delimitation enables an intensive and in-depth investigation of complex linguistic issues within their authentic, real-life context.

Case study research is not a monolithic method but encompasses various types, each suited to different

research objectives and theoretical contributions. Understanding these typologies is crucial for designing a rigorous and purposeful linguistic inquiry.

Robert Stake, a foundational figure in case study research, distinguishes three primary types based on the researcher’s interest and the study’s purpose: intrinsic, instrumental, and collective case studies (Stake, 1995: 3–7).

The paramount objective of intrinsic case study is to achieve a deep, comprehensive understanding of the unique aspects of a specific case, without the explicit intention of generalizing findings to a broader population. Such studies are chosen when the unique features of a particular subject offer valuable insights that cannot be replicated ethically or practically.

In an instrumental case study the chosen case is investigated not for its inherent uniqueness but to provide insights into a bigger research question, a broader issue, theory, or phenomenon. The purpose is to understand something else by understanding the case. For instance, an examination of how language input, a conducive environment, and motivation influence a specific student’s speaking proficiency could be instrumental in understanding general factors contributing to second language acquisition.

Collective case study (multiple case study) extends the instrumental case study by involving the examination of multiple cases. The primary goal is to understand a general phenomenon, to compare and contrast different contexts, or to explore how a particular issue manifests across various situations. This design helps to reveal common patterns and highlight differences across diverse instances, thereby mitigating some concerns about generalizability often associated with single case studies. The trend in contemporary applied linguistics research is increasingly towards multiple case studies to provide several instances of a phenomenon, addressing issues of typicality and variation (Stake, 2006: 16–38).

Stake’s typology is not merely a descriptive classification; it reflects the researcher’s epistemological intent. An intrinsic study prioritizes deep understanding of the unique, while an instrumental one uses that uniqueness to illuminate a broader theoretical issue. Collective studies then leverage multiple unique instances to build more robust analytical, general insights (Ellinger, McWhorter, 2016: 3–12).

Robert Yin, another influential scholar in case study methodology, categorizes case studies based on their specific research purpose into descriptive, exploratory, and explanatory.

The primary aim of descriptive case studies is to provide a rich, detailed description of a

phenomenon. They are not typically guided by pre-established generalizations but rather seek to present a comprehensive account of the subject. In linguistics, this could involve a detailed description of a specific language dialect, documentation efforts for an endangered language, or a historical account of the evolution of a particular linguistic feature.

Exploratory case studies are utilized when there is limited existing research on a phenomenon, or when the goal is to identify relevant research questions or procedures for a subsequent, more extensive investigation. They serve to gain initial understandings of a topic.

Explanatory case studies seek to answer “how” or “why” questions, aiming to explain the causal mechanisms behind a particular condition or sequence of events. This type is useful for establishing cause-and-effect relationships. In linguistics, an explanatory case study might investigate how language shapes political narratives (Yin, 2014: 1–19).

Yin’s typology explicitly links the type of case study to the nature of the research question: descriptive for “what”, exploratory for “what to study next”, and explanatory for “how” and “why”. This direct mapping signifies that the choice of case study type is not arbitrary but is a direct consequence of the researcher’s specific epistemic goals. The research material also explicitly states that case studies are a “preferred strategy when the research questions delve into “how” or “why” an event or situation occurs” (Ellinger, McWhorter, 2016: 1–13). This highlights the methodological precision and flexibility inherent in case study research.

Case studies are predominantly situated within the frameworks of qualitative research and naturalistic inquiry. They are often used “interchangeably with terms such as ethnography, field study, and participant observation” (Designing and Conducting, 2024), primarily because they share similar philosophical assumptions: they are conducted in natural settings and strive for a holistic interpretation of the event or situation under study. Therefore, case study research in linguistics is grounded in several methodological principles that distinguish it from other research approaches. These are boundedness and singularity, in-depth investigation, multiple perspectives, contextual emphasis, and inductive reasoning.

Boundedness and singularity are understood as the focus of case studies on clearly defined entities, whether individuals, groups, institutions, or specific linguistic phenomena, studied within their natural boundaries (Duff, 2008: 23). In-depth investigation means that the case studies emphasize intensive, holistic description and analysis, going beyond

superficial observations to understand the underlying complexities of linguistic phenomena.

Within multiple perspectives, researchers employ various data sources and collection methods to enhance the reliability and validity of their findings. This approach incorporates different perspectives of the same documented communicative event to achieve a more comprehensive understanding (Weidl, Goodchild, 2024: 3–4). Contextual emphasis is achieved when phenomena are examined within their real-life contexts, particularly when boundaries between the phenomenon and its environment are not evident. This includes consideration of linguistic, sociocultural, political, educational, and historical contexts (Duff, 2008: 95–97). As far as inductive reasoning is concerned, researchers analyse data, identifying patterns and generating insights rather than testing predetermined hypotheses.

Conducting a case study in linguistics involves a systematic, often iterative, process that encompasses careful research design, diverse data collection techniques, and rigorous qualitative data analysis.

According to R. Yin, a robust case study design must comprise five essential components: research question(s) (guide the inquiry, often focusing on “how” or “why” questions); propositions (theoretical statements or hypotheses that guide the data collection and analysis); unit(s) of analysis (clearly defines what constitutes the case (e.g., an individual, a group, an event, a specific linguistic phenomenon)); linking data to propositions (a clear strategy for how the collected data will be connected to the study’s propositions); criteria for interpreting findings (establishing clear criteria for interpreting the results, which helps maintain rigor and objectivity) (Yin, 2014: 19–57).

Concerning the data collection techniques, case studies are characterized by their reliance on multiple sources of evidence, allowing for triangulation to enhance validity and provide a comprehensive picture of the phenomenon. Common data collection methods in linguistic case studies include interviews, observations, document analysis, surveys and questionnaires, corpus linguistics (Salmons, 2021; Duff, 2014; McCombes, 2023; Okowa, Otero, 2024).

In-depth interviews with participants and key informants are a cornerstone of qualitative case studies. These interviews are typically broad and loosely structured, designed to elicit rich narratives, experiences, and meanings related to the linguistic phenomenon under study. Effective interviewing requires establishing rapport, asking open-ended questions, and active listening.

Direct observation involves systematically observing behaviors, interactions, and processes as

they unfold in real-time within the natural setting. Participant observation, where the researcher actively engages in the setting, provides an even deeper, firsthand understanding of language use in context.

Document analysis involves the systematic review and interpretation of various documents, both printed and electronic, relevant to the case. In linguistics, this could include a writer's drafts, school records of student writers, historical documents, official records, personal diaries, memoirs, or media articles.

While case studies are primarily qualitative, surveys and questionnaires can be used to collect self-reported quantitative data (e. g. on language attitudes or demographic characteristics) complementing the in-depth qualitative data.

As far as Corpus Linguistics is concerned, the study of large databases of naturally occurring language can provide insights into linguistic patterns and trends, offering a quantitative dimension to case studies. This can involve frequency analysis, collocation analysis, and concordance analysis.

The analysis in case study research typically progresses through several stages: describing experience, describing meaning, and focus of the analysis (Zucker, 2009). Describing experience stage involves systematically organizing and summarizing all collected data. Researchers identify possible sources of data, review literature for definitions relevant to the experience, and map data from multiple sources using tables or charts to cluster concepts. The goal is to construct models that conceptualize dimensions and ideas, categorizing experiences within relevant dimensions.

Building on the descriptive phase, describing meaning stage involves delving into the meaning participants ascribe to their experiences. Researchers consult literature and link research questions to the philosophical framework (e.g., social constructionism, symbolic interactionism). They review transcripts, archives, and records for instances of meaning, noting particular words or passages. The aim is to interpret participants' thoughts, actions, and feelings to understand the deeper meaning of their experiences.

The focus of the analysis stage involves linking the analyzed data back to the study's propositions and explicating the criteria for interpreting findings. The analysis focuses on context-specific or naturalistic generalization. Each case is analyzed separately to describe experience and meaning, concentrating on how experience is tied to specific states, carries consequences, and compares with typical trajectories (Zucker, 2009; Yin, 2014).

Common qualitative data analysis methods particularly suited for linguistic case studies include:

thematic analysis, discourse analysis, narrative analysis, and grounded theory.

Thematic analysis involves identifying, analyzing, and reporting patterns or themes within the data. It allows researchers to uncover underlying patterns in discourse and gain a deeper understanding of how language shapes social interactions. In second language acquisition studies, thematic analysis can be used to identify factors influencing language learning, such as motivation or culture shock (Peel, 2020).

Discourse analysis deals with written or spoken language within its social context. It helps identify how culture, history, or power dynamics affect the way concepts are discussed. Researchers examine linguistic features such as metaphors, power dynamics, and framing to uncover underlying social structures and processes. In case studies, discourse analysis offers a unique opportunity to explore intricate communication layers, revealing how language shapes interactions and beliefs (Macrae, 2020).

Narrative analysis focuses on listening to people tell stories and analyzing what those stories mean. It provides insights into how individuals make sense of reality by examining their stories and the way they are told, including plot, characters, setting, and themes. This method is particularly valuable for understanding personal experiences related to language learning or use (Warren, 2025).

Grounded theory as an inductive approach aims to develop theories and concepts directly "grounded" in the collected data. Researchers begin with observations of individuals or groups in action, formulating tentative definitions of concepts through iterative data collection and analysis. This method is excellent for discovering new things and ensuring findings are tightly connected to the empirical data (Noble, Mitchell, 2016: 34–35).

Conclusions. Case study research is the indispensable and powerful method within linguistics, offering a profound capacity for in-depth understanding of complex language phenomena. Case studies are not merely descriptive accounts but rigorous empirical inquiries, distinguished by their focus on a bounded system within its real-life context and their reliance on multiple sources of evidence. Whether the aim is to understand a unique linguistic anomaly, shed light on a broader theoretical issue, or compare phenomena across multiple contexts, methodologically, case studies in linguistics provide a tailored framework of qualitative research and naturalistic inquiry. They are grounded in a number of methodological principles and are characterized by an iterative design process, comprehensive data collection and sophisticated qualitative analysis approaches. This multimodal approach ensures a rich, multifaceted understanding of the subject.

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