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HELPING THE RESIDENTS TO KNOW WHAT TO EXPECT

Case study is relatively unfamiliar to both subjects and audiences. They don't know what to expect, especially in terms of a product. This won't stop them from building expectations. You could take some or all of the following steps to shape those expectations in line with your intentions:

1. CIRCE now holds quite a range of examples of case study products, illustrative of different styles and approaches. It may be that one of these is close to what you are trying to do, and could convey better than your words what your product will look like. There is no case study pattern book yet, and none of us is sufficiently adaptable to offer our subjects or readers a supermarket type of consumers choice even if we had one, but the use of examples, or of extracts which show how you intend to present such things as judgement data or classroom observations, could prevent serious misunderstandings.
2. You know how often people you meet talk very differently from the way they write. Your subjects or audiences won't necessarily know from hearing you talk how you will write. Nor will they necessarily guess correctly from your written proposal, if you have one, because that is a special form of writing. Assuming you don't have a previous case study to produce, show them some of your essay writing, indicating any changes or developments you hope to introduce.
3. Don't just tell the people you do the actual negotiations with what principles of procedure you intend to employ in the conduct of the case study. Write them up into a set of rules and make it available to all the residents with whom you may interact. Have copies pinned to notice boards.
4. Your preliminary negotiations for permission and access will have generated fantasies among the residents about what you are up to and who put you up to it. Before you arrive on site to begin the case study proper prepare a short account of how you came to be there and make the account available to all. If during the study you change the initial plan in any significant way, repeat this procedure. Keep track of fantasies by asking about them regularly in informal settings and take corrective action if necessary.
5. Tell the people you meet as accurately as you can what they can reasonably expect from you in terms of competence.
6. Tell them about any new burdens that have come your way that may threaten the amount of time you planned to spend on site or your original delivery date. If you don't do this they will put down your diminished attention to a loss of interest, and this can have serious repercussions for the study.
7. Avoid secretiveness of process. Tell people what you are doing even if you can't tell them what you've got.
8. As soon as you can, produce an example of something you've written about the case, even if it is only a rough draft.

RESPONDING TO ACCUSATIONS

Case study is close up, threatening. People can become very uncomfortable with its suffocating presence and attempt to regain the distance from the study they had at the beginning. One of the ways they can do this is by attacking the case study worker (only rarely physically) accusing the worker of misconduct or gross incompetence. Such accusations pose a threat to the continuation of the study, and you should respond to them in that light. The following suggestions also deal with responses to soundly based criticism.

1. Always find some kind of truth in the accusation, so that you can apologise.
2. If the accusation is true and constitutes a serious breach of the rules, agreement or basic ethics, offer immediate termination of the study and destruction of the data banks. If this offer is declined insist upon stronger resident controls over the study.
3. If the accusation is true but minor, apologise and promise to do better.
4. If the accusation is false and would, if allowed to stand, constitute a serious breach of rules, agreement or ethics, you must refute it. But treat the accuser with respect, respond reflectively to the accusation as to a puzzle, and claim at least some of the blame for the misunderstanding.
5. If the accusation is false but trivial, let it stand and apologise. If it is knowingly false your failure to correct may disarm the accuser. If it is a true belief you probably couldn't shake it anyway. If it is due to someone else's error (such as failing to pass on your message that you couldn't make it to a pre-arranged interview), don't pass the buck, accept the responsibility with "I thought I had taken care of that but I should have made sure".
6. If the accusation takes the form of a personal attack on your character or motivation, treat it as an insight which you hope is not sufficiently true to disqualify you from conducting the study. Invite the accuser, and others, to keep the characterisation in mind as the study proceeds and when they have opportunities to review the product.
7. Consider in any instance, but particularly when you are faced with a false accusation of some seriousness or with a number of apparently exaggerated concerns or grievances, whether there is a need to ease off the pressure of the study. Even those residents who initially welcome your attention may come to feel the strain. Consider also whether the fact that the accusations come from those you have chosen to observe closely or those you have decided to leave out, tells you something about developing feelings about your sampling within the case.
8. Review this list of suggestions, considering whether they are consistent with respect for persons.

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ON SITE CAVEATS

The following warnings are reminders that you are in a professional role and under continuous observation by people who have to trust you but who will remain alert to evidence that their trust has been misplaced.

1. Don't engage, at least observably, in flirtatious behaviour with residents, especially with the most attractive ones.
2. Remember that who you are seen with in informal settings or occasions will be seen as evidence of where your sympathies lie. Vary your company and in particular avoid being collared by the most senior people.
3. Be sensitive to the fact that as the study proceeds you will change from a powerless (uninformed) to a powerful (informed) observer. Sometimes we think that the time for giving reassurance to the residents is only at the outset - it is arguable that the longer the study goes on the more need for reassurance and information the residents have. The danger is that if you are experiencing growing difficulties in making sense and order of the study you will be tempted to become most introverted when this need is greatest. Be conscious of this and try to respond.
4. Mostly we conduct our studies in hierarchical organisations and mostly we have to negotiate access in a top down fashion. Avoid sequencing your data gathering in this way, or you run the risk of being shaped and guided by managerial perspectives and issues, and of being seen as contaminated by and associated with the level from which you have just emerged. Initially you should try to move swiftly through all the access gates, then try to construct a hierarchy of vulnerability to consequence that will guide your planning.
5. Be prepared for people pressing you for your opinions (decide in advance what you are going to give opinions about) pressing you for information (decide in advance the nature and timing of the feedback process) using you as a channel to deliver grievances (don't), using you as a confidant on the basis of a special and "protected" relationship, controlling the study by making uninvited arrangements for you which will keep you fully occupied in their study, or out of harm's way.
6. Don't preplan too many interviews or observation opportunities - leave plenty of time to be led by what you find.
7. Avoid inadvertent confirmation of status differentials between residents. Insist on buying lunch for the top guys, go dutch with those who feel on a level with you, allow the low status people to buy yours even if you are better off.
8. Be useful in whatever ways you can be to the residents, providing your role is not compromised.
9. Take opportunities on site to participate in activities in which you do not excel (games and sports perhaps). Be prepared to look foolish - (you do after all ask them to take that risk with the study).

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