Case Study Methodology: A Threshold-Based Self-Diagnostic Scorecard

Purvis, A. J., Kim, V., Linden, K., & Nicholas, V. (2026). Unpacking your case: The case study as a research methodology. *Journal of University Teaching and Learning Practice, 23*(4). https://doi.org/10.53761/xq512k08

★ Must answer Yes (non-negotiable)

● Should answer Yes (context-dependent)

Pillar 1 – Defining the case

Type	No.	Question	Yes/No	Notes
★ Must	**Q1**	Can you name and bound your case? (Who or what is it? Where does it begin and end?)	☐ Yes ☐ No	
★ Must	**Q2**	Does your research question require depth and contextual understanding to answer – rather than breadth or statistical generalisation?	☐ Yes ☐ No	
● Should	**Q3**	Are you studying the phenomenon through the context – not using the context merely as a backdrop?	☐ Yes ☐ No	
● Should	**Q4**	Can you explain why this case was selected, and not another? Is the selection rationale stated in your manuscript?	☐ Yes ☐ No	

Threshold: Both ★ (Q1 and Q2) must be Yes. At least 1 of 2 ● (Q3, Q4) must also be Yes.

Pillar 2 – Evidencing the case

Type	No.	Question	Yes/No	Notes
● Should	**Q5**	Do you draw on more than one source of evidence? (e.g. documents, interviews, observations, artefacts)	☐ Yes ☐ No	
★ Must	**Q6**	Can you describe the analytic steps that moved you from raw data to interpretive claims?	☐ Yes ☐ No	
● Should	**Q7**	Does your manuscript show how you weighed competing interpretations, so that a reader can judge the credibility of your claims?	☐ Yes ☐ No	
● Should	**Q8**	Have you acknowledged your positionality as a researcher and its potential influence on the study?	☐ Yes ☐ No	

Threshold: ★ (Q6) must be Yes. At least 2 of 3 ● (Q5, Q7, Q8) must also be Yes.

Pillar 3 – Contributing beyond the case

Type	No.	Question	Yes/No	Notes
★ Must	**Q9**	Does your case connect to a broader conceptual or theoretical frame that links it to existing literature?	☐ Yes ☐ No	
★ Must	**Q10**	Have you stated explicitly what your case reveals that was not already known, or known differently?	☐ Yes ☐ No	
● Should	**Q11**	Have you addressed where and why your insights may resonate in contexts beyond this immediate case?	☐ Yes ☐ No	
● Should	**Q12**	Have you avoided overclaiming transferability – framing it as resonance or analytic generalisation rather than replication?	☐ Yes ☐ No	

Threshold: Both ★ (Q9 and Q10) must be Yes. At least 1 of 2 ● (Q11, Q12) must also be Yes.

Note: A 'No' answer to a ★ question does not mean your work lacks value. A reflective account, illustrative vignette, or practice report can be a rigorous and publishable contribution – framed accurately. Accurate framing strengthens, not weakens, a submission.

✓ Ready to submit	⚠ Revise before submitting	✗ Reconsider framing
All ★ questions answered 'Yes' AND meet threshold in every pillar.	All ★ questions answered 'Yes' BUT the ● threshold is not met in one or more pillars. Strengthen before submitting.	One or more ★ questions answered 'No'. The study may not be a case study as described. Reframe accurately.