

# Mixed Method Approaches:

## Organisational case study methodology

Professor Sheila Payne  
Palliative and End of Life Care  
Research Group  
University of Sheffield, UK

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# Aims of this session

- To introduce the rationale and purpose of case study methods
- To describe indications for when this might be a suitable research design
- To explain the different types of case study design
- To discuss two examples of research using organisational case study methodology
- To highlight the strengths and weaknesses of this methodology

# Definition – drawn from Yin (2003)

A case study is an empirical inquiry that:

- Investigates a contemporary phenomenon within its real-life context, especially when:
- The boundaries between phenomenon and context are not clearly evident.
- Focuses on many variables.
- Uses triangulation to make sense of multiple data sources.
- Uses prior theoretical propositions to guide data collection and analysis.


# When to use this method

- Interested in an identifiable entity such as:  
an individual, a group, an organisation.
- Interested in the social, political and cultural context in which the case is embedded.
- Uses the principles of naturalistic inquiry.
- Suitable for investigation of 'real world' situations.
- Suitable for contexts where it is difficult or impossible to control potentially confounding variables.

# When to use case studies in palliative care

- Dynamic situations.
- Evaluations of new and emerging complex interventions.
- Variability in interventions (each tailored to patient and family needs) for different periods of time.
- Ethical concerns about randomisation and placebo control.

# When *not* to use case studies

- Clinical descriptions of a case.
  - When you wish to randomly allocate people to an intervention.
  - In-depth qualitative analysis alone.
  - Survey alone.
  - Experiment alone.
  - Inductive theory development.
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# Indications for using case study methods

In evaluation research:

- Description of real-world case.
- Illustrate certain features of a case.
- Explain features of case and relationship to other cases.
- Explore the situation in which interventions are conducted.
- Meta-evaluation – study an evaluation.

# Different types of case study design

- Single case designs – eg one service and its context.
- Single case, embedded designs – eg. N number of patients with same condition treated in one hospice.
- Multiple case designs – eg. N number of patients with same condition treated in different hospices
- Multiple case, embedded designs – eg. Number of different patients in different hospices.



# Data sources and analysis

- Quantitative data – eg. service use statistics, costs, surveys.
- Qualitative data – eg. Interviews, focus groups, diaries.
- Documentary data.

## Analysis:

- by case
- cross case comparisons

# Examples of organisational case studies in palliative care

- Investigation of the role of community hospitals in the provision of palliative care for older people
- Evaluation of adult bereavement support provided by hospices
- Evaluation of childhood bereavement services in the UK

# Investigation of the role of community hospitals in the provision of palliative care for older people

## Research Team

- Sheila Payne
- David Seamark
- Frances Sheldon
- Carol Davis
- Helen Roberts
- Nikki Jarrett
- Paul Roderick
- Helen Smith

## Research Staff

- Sheila Hawker
- Chris Kerr
- Mary White

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# Aims

- To identify the extent to which community hospitals are involved in providing palliative and terminal care to older people with end stage cancer and non-malignant diseases.
- To examine the nature and quality of palliative care delivered from the perspective of patients, their relatives and staff.

# Overall study design

- *Phase 1 April – December 2001*

A national survey of all 478 Community Hospitals

- *Phase 2 January – August 2002*

Interviews with hospital managers/senior nurses in 30 Community Hospitals in the South East and South West

- *Phase 3 September 2002 – March 2004*

In-depth **organisational case studies** of six community hospitals using observation, questionnaires and interviews in the South East and South West.

# Rationale for using case study design in the third phase

- In-depth account of service provision from multiple perspectives
- Use of multiple sources of data
- Use of multiple types of data
- Impossible to control any variables
- Complex situation
- Interested in context in which community hospitals were situated.

## *Phase 3: Organisational case studies*

<i>Size (Beds)</i>	Small <30 3	Medium 30-49 2	Large >50 1
<i>Location</i>	Rural 4	Coastal 1	Urban 1
<i>Organisation Of care</i>	GP led 4	Consultant Led 1	Shared care 1

# Participants and data sources

- ***Older patients*** in community hospitals (n=18)  
10 women, 8 men, age range 68-90, 10 had cancer – semi-structured interviews
- Current ***carers*** (n=11) interviews (9 women)
- ***Bereaved carers*** (n=51) interviews (40 women)
- Staff (n=125) questionnaires from  
***doctors*** (31), ***nurses*** (44), ***care assistants*** (22),  
***other professionals*** (28).
- Non-participant ***observations*** approx. 900 hours



# Evaluation of adult bereavement services provided by hospices

**Sheila Payne<sup>1</sup>, David Field<sup>2</sup>, Marilyn Relf<sup>3</sup>  
and David Reid<sup>1</sup>**

1. Palliative and End-of-Life Care Research Group,  
University of Sheffield, UK

2. Department of Health Sciences, University of Leicester

3. Sobell Study Centre, Sir Michael Sobell House, Oxford



# Aims

- To describe the purpose, organisation and delivery of bereavement support services.
- To examine the role of professionals and volunteers in providing these services.
- To assess the views and outcomes of bereaved people who have used and not used these services.

# Research Design

- Phase 1: National postal survey of adult bereavement services provided by hospices and specialist palliative care services
- Phase 2: **Organisational case-studies** at five selected services

# Rationale for using case study design in the second phase

- In-depth account of service provision from multiple perspectives
- Use of multiple sources of data
- Use of multiple types of data
- Impossible to control any variables
- Complex situation
- Interested in context in which bereavement services were situated, others sources of support
- To make comparisons between different types of bereavement services (eg. volunteer versus professional only services)
- To understand the views of bereaved people who declined services.

# Research Methods

Method	Paid Staff	Volunteers	Non-Hospice Staff	Bereaved people
Qualitative interviews	Yes	Yes	Yes	Yes
Focus groups	Community nurses	Yes	Community nurses	Yes
Structured questionnaires				Grief Experience Inventory; SF36
Observation of meetings and events*	Yes	Yes	No	No
Documentary evidence	Records, 'referral' forms	Referral information	Information sheets	Letters of invitation, information sheets, bereavement booklets

- Observation was limited at sites 2 and 4 because the researchers were not based in the main hospice building.

## Summary characteristics of the five bereavement services

Site	Duration of Service	Size of Service	Bereavement Volunteers	Activity level	Locality
1	Old	Large	Yes	High	South West
2	Old	Small	Yes	High	West
3	Young	Small	Yes	Low	North Midlands
4	Young	Large	Yes	High	South Midlands
5	Young	Small	No	High	South East

# Data Analysis

- Descriptive account of each case site.
- Comparative analysis across sites.
- Offer generalisations from commonalities and differences observed in the data.

# Strengths of case study methods

- Provides complex accounts
- Takes account of multiple perspectives
- Offers evaluation rather than just description
- Possible to offer some generalisations
- Evaluation method for real world contexts.



# Weaknesses of case study methods

- Difficult to infer causation.
- Time consuming
- Difficult to make sense of multiple and possibly contradictory data
- Selection bias always a possibility – limited claims for representativeness
- Limited generalisability
- Hawthorn effect possible

# Key references

- Yin, R.K. (ed.) (2003). *Case Study Research: design and methods* (3rd edition) Thousand Oaks, CA: Sage.
- Walshe, C.E., Caress, A.L., Chew-Graham, C. and Todd, C. (2005) Case studies: A research strategy appropriate for palliative care? *Palliative Medicine* 18: 677-684.