

INQUIRY CASE STUDY

An Inquiry Case Study has the following characteristics:

- It focuses on a real world situation and provides facts about it, including relevant background information.
- Crucially, it does not disclose the actual resolution.
- Guided by the learning goals of the case, writers have to make choices about the extent of the case facts to include and leave out. It can be limited, forcing readers to make multiple inferences about relevant facts, or it can be dense, forcing readers to sift through the information and decide what is most relevant to the main issue. Some information may be incomplete or ambiguous – as it often is in real world situations – thus requiring readers to make inferences about its relevance to the situation.
- Some of the facts may be "distractors": they are not essential and simulate the "noise" real world participants would encounter when trying to understand the situation.
- It asks readers to take on the role of characters in the case and decide what knowledge – such as concepts, frameworks, policies, and tools – is relevant to the situation, propose a resolution, and justify it with evidence from the case.

An Inquiry Case is a real world story without the actual real world ending. The author does not interpret the information in the case or explain what it means. For example, a case telling a story about decision to authorize a project does not reveal the final choice. It also does not tell readers what information is important to consider in making the decision, how the information is relevant to the decision, or which decision option is best supported by the evidence.

These omissions may seem to negate the value of a story, but an Inquiry Case has a specific learning goal that requires omission of the ending and of any interpretation of the case information. The goal is to have readers interpret the case information on their own and consider the best ending as if they were the main character in the case.

The value of Inquiry Cases for students is that they provide opportunities to practice and receive feedback in the essential skills students will have to perform in the real world. Instructors can teach students about essential skills, but only through practice and instructive feedback will students develop proficiency in using those skills. Inquiry Cases give learners an opportunity to develop and hone real world skills.

Writing an Inquiry Case

Here are four writing issues essential to building an Inquiry Case:

- Choosing the main issue and main characters
- Developing the fact base
- Avoiding interpretative statements
- Designing the story arc

Choosing the Main Issue and Main Characters

First, the writer needs to identify the main issue of the case and the main characters. The main issue depends on the real world situation the story will narrate. Fortunately, the main issues of most Inquiry Cases fall into one of three distinct categories:

1. Decision
2. Diagnosis
3. Evaluation

Briefly, many cases begin and end with a character or group considering a decision that needs to be made. Not surprisingly, this is the most common type of case, at least in business disciplines. Example: a government agency must decide the best available option for financing a large housing project.

When diagnosis is the main issue, a character or group is confronting some kind of outcome that they don't understand. They must diagnose the causes of the outcome in order to do something about it. Example: an important and expensive project has failed to meet its goals and the causes of the failure are not certain. The stakeholders want to know what major causes drove the failure.

When the main issue is evaluation, a character or group has to assess something (such as a performance, act, or a past decision), usually in order to take some kind of informed action. Example: a major redevelopment project was completed five years ago and the stakeholders want to evaluate whether it is achieving its longer term goals.

A case can be written as a story without people. For instance, a case can describe the actions of organizations rather than individuals. However, stories are more engaging with people in them. Moreover, most real world situations revolve around at least a few key people. Finally, a strong main character gives readers a focal point for thinking about the case.

Designing the Story Arc

The writer has to structure the arc of the story, deciding where it will start, in what order information will be delivered, and how to end it. Defining the main issue of the case is a necessary step to designing the story arc. For instance, a story about a decision is going to be different from one about a diagnosis. A case about a decision should introduce the decision and decision makers early in the story. A case about a diagnosis should start by describing the subject that needs to be diagnosed and the main character or characters who will be involved in the diagnosis.

Please see the Inquiry Case Templates below for more guidance about organizing the case story.

Developing the Fact Base

Writers have to decide what information to include in a case and what to leave out. An author's research for a case almost always yields far more information than can be realistically presented in a case. Too much information can overwhelm readers and make the task of identifying essential information onerous. It can also obscure the case's main issue.

Short cases have advantages for both instructors and students. Students often are more willing to read and think about a short case, which leads to a better discussion of it. Short cases require authors to maintain a tight focus on the main issue. They also are not necessarily easier than long cases. Given a limited fact base, readers have to make multiple inferences about relevant facts and what they mean.

In long cases, the fact base is extensive, and readers have to sift through a large amount of information, identify facts, and decide which are most relevant to the main issue. Long cases can be a good match for individuals with extensive experience in a field such as graduate students and professionals. They can also provide a serious challenge for readers to differentiate crucial information from less important information or information that has little to no value ("noise").

Some information in a case may be incomplete, ambiguous, or misleading – as it often is in the real world. Learning to recognize such information and knowing when reasonable inferences can be made from them are valuable skills.

Finally, an Inquiry Case may include information that is a distraction: it is not essential and simulates the noise encountered in the real world. This too is a useful skill because the real world generates high levels of noise.

Avoiding Interpretative Statements

Writers of Inquiry Cases have to avoid making statements that interpret the information in the case for readers or make judgments for them. Academics and professionals used to writing articles and papers often find these statements hard to resist. However, the writer can represent different interpretations and judgments regarding the content through characters in the case. For example, the two main characters of a case can express conflicting opinions about the main issue.

General Information about the Case

This section is not part of the case itself. The information will help the Lincoln Institute describe the case to potential users and support users to find relevant cases in the digital case library.

- Topic and subtopics
- Timeframe
- Learning goals

- Primary audience
- Prerequisite knowledge
- Brief summary

Topic and Subtopics

Specify the topic and subtopics to help instructors and facilitators understand how the case fits into a discipline.

Timeframe

Specify the inclusive dates of the main events of the case.

Learning Goals

States the knowledge, skills, and expected outcomes of the case using active verbs (understand, apply, analyze, evaluate or create).

Primary Audience

Indicate the most appropriate audience for the case. Example: graduate urban planning students.

Prerequisite Knowledge

Specify what the primary audience needs to know to make best use of the case.

Brief Summary

In a few sentences describe the primary topic of the case and the major events it covers.

INQUIRY CASE TEMPLATES

Title of the Case

The title should state the main subject of the case. Interesting titles and subtitles can pique reader interest. Example: The Hudson Yards Infrastructure Project: Banking on the Future in Manhattan.

Introduction of the Main Issue and Characters

The first section of the case should be relatively short. (By "section" we mean one or more paragraphs set off by headings in the text.) Remember that most readers will not be familiar with the subject of the case and a long and verbose first section will likely overload them with information. Overload has only negative consequences: it can confuse the audience, discourage them from reading further, or cause them to start skimming.

The first section of the case story should introduce the main character and the subject of the case. Information about the main character typically includes the name, the character's job or position, background, and relationship to the subject of the case. If there are several characters of equal importance to the case story, they should be introduced in the first section – as succinctly as possible.

How to express the subject of the case depends on the type of case:

- **Decision:** the decision should be explicitly stated. Authors also often include the major decision options in the first section, but they can be described in later sections or even at the end of the case.
- **Diagnosis:** the first section should give readers an overview of the outcome or results that are not understood. An analogy is the major symptoms that a patient presents to a doctor. Subsequent sections can provide detailed information about each of the major symptoms. To be clear, when we say introduce the subject or main issue, we do not mean writers should state that a case is about a diagnosis. Students need to be able to recognize situations that call for a diagnosis. Say that a case is about a public-private partnership that has collapsed and lost large amounts of money. The writer could begin by briefly describing the failure and introducing the small committee investigating it. The writer could describe the committee's purpose as "understanding factors contributing to the failure of the partnership." Later sections could fill in the background of the project, the terms of the partnership, and the details of how the partnership operated.
- **Evaluation:** the first section should present the character or characters responsible for the evaluation and the subject of the evaluation. Case writers are free to tell readers that the main issue involves an evaluation. However, as noted above about diagnosis,

students should learn how to recognize when an evaluation is useful. Say that the government side of a public-private partnership to repair roads and build new ones wants to know whether it has worked out well for the public. The opening section would briefly describe the partnership, the individual responsible for studying the issue, and the current situation – a lack of clarity about whether the government has gotten the amount of repaired and new roads it anticipated and whether it has paid a fair price for them. Later sections could go into much more detail about the reason for the partnership, its terms, and the work that has been performed.

Background

Many cases provide background information after the opening section. The information can be important in understanding the roots of a decision, an outcome that needs to be diagnosed, or a subject that needs to be assessed. For example, the background of a diagnosis case can trace the history of an organization in which an outcome needs to be diagnosed. The section could, for example, imply that the organization has ignored a specific negative outcome for years until the survival of the organization was at risk.

The information in a Background section can be important to understand the main issue (as in the example given above), of mixed importance (information essential to the main issue is mingled with nonessential information), or largely irrelevant. The inclusion of nonessential or irrelevant information depends on the importance the case writer attaches to students' ability to differentiate the value of information.

Body of the Case

The sections that follow Background (if it is included) vary widely from case to case. They can be organized chronologically, telling the story as a history with clear divisions; by topics or issues closely connected to the main issue; or by the parts of a theoretical or analytical framework.

There are no hard and fast rules for selecting topics and their sequence. However, the three types of main issues can help authors think through what content to include and in what order.

- **Decision:** appropriate decision criteria are a crucial part of the underlying logic of decision-making. The body of a decision case can be broken down into topics that mirror the most important criteria – for example, social purpose, finances, and quality of planning, design, and construction. In an Inquiry Case, the writer usually does not explicitly say that the topics correlate with the criteria – that is a task for readers. However, the writer might want to be more specific to help structure students' thinking about a decision. Another way to organize the body of a decision case is to offer the perspectives of different parties to the decision, different policies that apply to the decision, the views of all stakeholders – those who are decision makers and those who are not – or a combination of these.

- **Diagnosis:** the body of the case should provide information about the outcome that needs to be diagnosed. A writer can organize information into sections that address the major symptoms, that implicitly reflect the major causes of the outcome, or implicitly reflect the frameworks most helpful in diagnosing the subject of the case. Any of these organizations can be combined with the opinions of case characters.
- **Evaluation:** the writer of an evaluation case needs to provide sufficient information about the subject so that readers can make a reasonable evaluation. The information can be organized chronologically or topically. The topics can be influenced by the evaluation criteria most appropriate for the subject or the framework most helpful for evaluating the subject. These organizations can be combined with the opinions of case characters.

Whatever the main issue is, the writer can vary the value of the information and even its truthfulness. Case writers need to be confident that readers will have the knowledge necessary to properly sort out valuable from less valuable information. They also have to provide cues to help readers recognize inaccurate or false information.

Conclusion

At the end of an Inquiry Case, readers are usually returned to the beginning of the story. The main character reflects on the main issue, what is at stake, and sometimes the actions that will need to be taken after the main issue is resolved. The point is to put readers in the position of the main character and ask themselves what they would do.

New information can be introduced. A decision case, for example, might end with the major decision options that the main character – decision maker should consider. The main character could also be thinking about the consequences of the decision – the benefits flowing from a good decision and the damage flowing from a bad one. A common way to end a diagnosis or evaluation case is to have the main character think about what she or he is going to say about causes or about the overall evaluation of the case subject – the positives and negatives that can result.