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"Which Cases Do I Need?" Constructing Cases and Observations in Qualitative Research

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Abstract

This methodological review starts one step before Small's classic account of how many cases a scholar needs. We ask, "Which cases do I need?" We argue that a core feature of most qualitative research is case construction, which we define as the delineation of a social category of inquiry. We outline how qualitative researchers construct cases and observations and discuss how these choices impact data collection, analysis, and argumentation. In particular, we examine how case construction and the subsequent logic of crafting observations within cases have consequences for conceptual generalizability, as distinct from empirical generalizability. Drawing from the practice of qualitative work, we outline seven questions qualitative researchers often answer to construct cases and observations. Better understanding and articulating the logic of constructing cases and observations is useful for both qualitative scholars embarking on research and those who read and evaluate their work.

INTRODUCTION

How do qualitative researchers decide who to talk to and where to spend time? And what are the implications of these choices? Scholars have had extensive discussions about how quantitative researchers should select observations in order to reliably and validly generalize to a population of interest (e.g., Couper 2017, Heckathorn & Cameron 2017, Lazer & Radford 2017). By contrast, crafting qualitative cases and observations remains largely customary, a practice passed down from scholar to scholar, often in graduate school from faculty to students. We know of no systematic sociological review that articulates the logics of case construction in qualitative research. This article begins to address this absence.

This review starts one step before Small's (2009) classic account of how many cases a scholar needs.[1] Before sociologists reach what Small has called "observational sufficiency" or "saturation," they first need a clear rationale for how to craft observations. The guidance we offer, collected from a review of qualitative practices, takes up Small's call to clarify the unique language and objectives of qualitative research, which differ from those of quantitative statistics.

This requires a distinction between sampling and constructing observations from cases (Bourdieu 1991, Ragin & Becker 1992). Both qualitative and quantitative studies construct cases and observations. Probability sampling, which is often considered a gold standard for much quantitative research, typically requires the observer to fix their categories of interest at the start and then select observations probabilistically based upon predetermined categories of interest. The great advantage of such an approach is in its capacity for empirical generalizability—that is, its ability to extend claims made from the observed sample to the unobserved population of interest.

Qualitative researchers, by contrast, typically undertake investigations in a far more iterative way, beginning with case construction, or the creation of a social category of inquiry. Constructing a qualitative case is typically done over time, through deep immersion into comparatively fewer research subjects, with the scholar shifting and refining the case as they conduct interviews and observations in the field (for more on this type of abductive analysis, refer to Tavory & Timmermans 2014, Timmermans & Tavory 2022). Generalizations are typically not to a population of interest but to the abstracted concepts elucidated by observing an example or multiple examples of a case (Mahoney & Goertz 2006, Small 2017). We argue that a major goal of most qualitative research is this kind of conceptual generalizability (Becker 1992; Ragin 1992a,b). These different forms of generalizability reflect, in the words of Knorr-Centina (1999, p. 1), different "epistemic cultures" that "create and warrant knowledge."

From our review of qualitative work, we have identified seven stylized questions researchers tend to ask when constructing qualitative cases and observations. We explain the logic behind each question and discuss the consequences of different answers. These questions serve as a heuristic to better understand how qualitative scholars craft their research and to help guide scholars as they design new projects and evaluate the work of others. In practice, the answer to each question is likely to change throughout data collection and analysis. Considering the implications of different answers to these questions as the researcher's project shifts course can lead to clearer and more defensible research.

We center this review around two basic questions: "What is the phenomenon of interest?" (constructing a case) and "What is the subsequent logic of crafting observations from within that phenomenon?" There is no ideal answer to either question. Different logics of case construction are not necessarily better or worse, but they do have implications for and present limitations to the kinds of analysis undertaken and claims made. Making these more explicit, as we do in this

[1] In the language of this article, what Small calls a "case" is an observation.

review, provides greater clarity for qualitative design and reviewer evaluation (see also Gerson & Damaske 2020, Lareau 2021, Luker 2008, Small & Calarco 2022). Our primary focus is on in-depth interviews and ethnographic methodologies, though the framework we outline may be useful for crafting a wider range of qualitative research (e.g., Benzecry et al. 2020, Mayrl & Wilson 2020).

WHAT IS A CASE?

Intentionally or not, scholars often compare qualitative cases and observations to an imagined ideal of quantitative, probability sampling (Lareau 2012, Small 2009). Yet such sampling is far from representative of the range of selection techniques within quantitative work. Within the past decades, big data, network, and computational approaches have become more common (Bhatt et al. 2022, Edelmann et al. 2020, Nelson 2020). Meanwhile, experimental work has renewed appreciation for causal evaluation and argumentation (Correll 2014, Jackson & Cox 2013). As for most qualitative work, probability sampling is not possible (for exceptions, refer to Alexander et al. 2017, Damaske 2011, Gerson & Damaske 2020, Streib 2020). It is also often not the ideal, given the epistemic approach qualitative researchers tend to take.

Sociologists' tendency to idealize probability sampling assumes that alternative ways of crafting observations are pragmatic, second-best solutions; this obscures more positive accounts of the kinds of choices qualitative researchers make. These decisions, even when using the most inductive techniques, are guided by a conceptual framework that qualitative researchers develop before observing the case. Duneier (1999), for example, who offered a highly inductive extended place method, nonetheless asked and answered the question "What is my case?" within his approach. For almost all researchers, the initial answer to this question tends to be a tentative or vague first step. For Duneier, the case was daily life in a diverse urban neighborhood, and he crafted observations of sidewalks where marginalized men, often stigmatized as outsiders, played a surprising role in the vitality of that neighborhood.

We define cases as social categories that the researcher makes observations of to generate (*a*) descriptive claims to better understand the social world and/or (*b*) conceptual claims about other instances of that category that are not observed. Cases are objects of interest but not units of observation in the measurable or quantifiable sense; in fact, cases are a level of abstraction above units of observation, or units of data collected (e.g., an interview). For some ethnographers, cases are one and the same as their field sites; but as the relational turn has suggested (Desmond 2014, Emirbayer 1997), this is not always so. In some in-depth interview studies, cases might be a trend (e.g., families' increasing insecurity; Cooper 2014, Pugh 2015), shared group experience (e.g., working mothers; Collins 2019, Dow 2019), or set of unequal relations (e.g., reproductive politics; Littlejohn 2021, Rudrappa 2015). For ethnographic studies, cases could be organizational dynamics (Chen 2009, Williams 2021), gender policing (Connell 2022, Pascoe 2007, Robinson 2020), or institutional racism (Jensen 2023, Van Cleve 2017).

In the vast majority of qualitative work, cases tend to be (re)constructed throughout the research process. Becker (1992) advises researchers to continually ask, "What is it a case of?" as they collect observations, using new pieces of evidence collected to evaluate previous understandings. Researchers have largely converged on the position that cases are constructed, or "cased," as Ragin (1992b) phrased it, throughout the research process, rather than found—an approach that presumes these entities exist statically in the world independent of the researcher's interest (Becker 1992, Jensen & Auyero 2019).

Case construction relies upon crafting observations, wherein units that represent cases are observed in order (*a*) to make empirical claims about units that are not observed and/or (*b*) to evaluate the conceptual frameworks of cases. As cases tend to be constructed processually, what counts as an

observation shifts as cases are refined and clarified. Observations of cases can be either sufficient or insufficient for claim-making, but more observations or even probabilistically made observations within a case are not necessarily better for the validity and reliability of claims. A positivist approach tends to presuppose a stable object of knowledge that is constant across cases and observers. Many qualitative researchers are skeptical of this stance and instead investigate how cases shift across time and place. Such critics of a more positivist logic hold that no study—regardless of the quality of its sampling technique—is free from bias because the social world is not objective, rational, or fixed, and who we are and how we interact with the world shapes what we find (Collins 1986, 1999; Smith 1987). Others choose to describe fewer cases in far greater detail to deepen our understanding or are interested in nonrepresentative cases to help reveal conceptual patterns and new sets of relationships—for example, queer families who by definition transcend categorical representation (Averett 2016, Pfeffer 2016).

In case construction, units are observed in order to produce propositions that are more likely to be true than not in other (unobserved) contexts. The qualitative observations within a case of something will not necessarily be strong predictors of empirical findings in other unobserved cases of that same thing (Jensen & Auyero 2019). But they should provide more rather than less accurate conceptual frameworks for similar unobserved cases. For example, in their work on sexual violence, Hirsch & Khan (2020) produced a series of observations grounded in life at an urban, private, elite school, using one university as a context to study sexual violence. The observations are not expected to be replicated in other university contexts that are not urban, or private, or elite. But empirical generalizability was not the project's aim: The potential value of the work lies in whether the conceptual framework can be usefully applied to other contexts in which sexual violence occurs. That is the core of conceptual generalizability.

CONSTRUCTING CASES AND OBSERVATIONS

Through an analysis of qualitative practice, we found that qualitative scholars tend to answer seven major questions over the course of their research: (*a*) "What is the explanatory aim?" (*b*) "What is the phenomenon of interest and what is it a case of?" (*c*) "What is the analytic lens?" (*d*) "Are observations typical, atypical, or both?" (*e*) "How will the study weigh the goals of maximal depth and breadth during data collection?" (*f*) "How will the study structure in strategic comparison?" and (*g*) "How are observations constructed iteratively?" These questions are not exhaustive, nor are they exclusive to qualitative research; not all projects make all of these decisions, nor do they weigh them equally. Yet they serve as a heuristic for designing, understanding, and explaining qualitative projects. The sidebar titled Constructing Cases and Observations outlines these seven questions. **Table 1** consolidates our definitions of key terms.

Question *a*: What Is the Explanatory Aim?

Qualitative scholars have diverse aims but in general undertake some combination of the following: describing a phenomenon of interest, explaining why it occurs, explicating processes through which social forces play out in the world, evaluating or elucidating a theory, and/or uncovering the mechanisms that undergird social trends. For descriptive projects (e.g., Bourgois 1995, Duneier 1999), the ethnographic warrant may be that a phenomenon, group, or process is new, understudied, or not fully understood, and knowing more is important. Descriptive projects prioritize giving precise and rich accounts of a phenomenon. This is not to say that they lack conceptual implications; they can unsettle existing frameworks through negation. Duneier's (1992) *Slim's Table* provides a description of the life of Black men in the Valois diner on the south side of Chicago. This project led him to reject theories of Steele (1991), Wilson (1978), and Anderson (1978) about Black

CONSTRUCTING CASES AND OBSERVATIONS

Qualitative scholars tend to ask seven core questions when constructing cases and observations.

- **Question *a*: What is the explanatory aim?** Decide whether the project's goal is solely description or also conceptual and/or empirical generalizability. Given qualitative methods' strengths, the goal for most studies is conceptual generalizability.
- **Question *b*: What is the phenomenon of interest a case of?** Describe the topic of interest without using any of the major identifying words (known as Bernie Beck's trick). This helps move from a general topic of interest toward a conceptual research question.
- **Question *c*: What is the analytic lens?** Will the focus be on a subset of people, a place, a set of relations, a process, a trend, an organization, an institution, etc.? This analytic lens will structure how to craft observations. The lens may change throughout the research process.
- **Question *d*: Are the observations typical, atypical, or both?** Typical observations can refer to those that are typical in the world or in the literature. Atypical observations can be rare phenomena, understudied people or places, or unusual contexts, whether in the world or the literature.
- **Question *e*: How does the study weigh the goals of maximal depth and breadth?** Defining a case clearly and recognizing how it has been studied in previous work can help a researcher decide how to balance maximal deep description with fewer observations and maximal broad variation with more observations.
- **Question *f*: How does the study structure in strategic comparison?** All sociological research involves comparison, as variation is required for explanations. Structuring in deliberate forms of comparison—with a matrix approach, a contextual comparison, or a within-group comparison—can help to organize data collection.
- **Question *g*: How are observations constructed iteratively?** Additional observations are constructed in light of provisional trends and patterns seen within previous observations. Researchers reflect on what has been observed, evaluate the depth and breadth of these observations, and weigh the potential utility of collecting new data for subsequent argumentation.

masculinity, social ties, and belonging in neighborhoods and broader US society. Such a negation of existing theories did not offer an alternative conceptual claim about Black masculinity based on the particular case. But it did reorient scholars' understanding in the subsequent literature on urban neighborhoods, Black masculinity, social ties, and poverty. Projects that are organized around descriptive aims are generally less interested in generalizability, but this does not preclude them from seeking it, or inspiring it in their fields of interest. All projects that seek to generalize engage in description.

If the goal is to generalize, cases are constructed so that subsequent observations can stand for something bigger than their particularities (Luker 2008) and allow the researcher to investigate the categories, relationships, practices, experiences, or processes of interest (particularly as the existing literature understands them). Being able to stand for something bigger refers to our previous distinction between empirical and conceptual generalizability—that is, the researcher's explanatory aim with respect to the observations' ability to generate claims about similar, unobserved cases. What exactly the observations stand for may be constructed at the onset of data collection using random sampling techniques (empirical generalizability) or it may be determined through constructing a conceptually relevant case and observations that provide insights into similar cases (conceptual generalizability). This ability to stand for something bigger in defining what a phenomenon is a case of is a matter of debate among scholars (Ragin 1992a, Timmermans & Tavory 2022).

Table 1 Definitions of terms

Term	Definition
Analytic lens	Used to structure how researchers examine their case by informing which units of observation to investigate. The focus may be on, e.g., a subset of people, a place, a set of relations, a process, a trend, an organization, or an institution.
Breadth	Achieved through crafting observations with maximal variation.
Case	Social categories that the researcher makes observations of in order to generate (*a*) descriptive claims and/or (*b*) conceptual claims about other instances of that category that are not observed. Cases are objects of interest but not units of observation in the measurable or quantifiable sense. Cases are a level of abstraction above units of observation.
Conceptual generalizability	Capacity to generalize to the abstracted concepts elucidated by observing an example or multiple examples of a case (and not to other populations of interest).
Constructing qualitative cases	The construction of a social category of inquiry that may develop over the course of a study, with the goal of conceptual but (usually) not empirical generalizability. Units are observed to produce propositions that are more likely to be true than not in other similar unobserved contexts.
Crafting observations	Identifying units of observation to better understand or refine the case. Requires structuring comparison to leverage variation, with sufficient descriptive context for conceptual accuracy.
Depth	Achieved through crafting observations with maximal description.
Empirical generalizability	Capacity to generalize from sampled observations to a population of interest that is not observed.
Phenomenon of interest	The topic that the researcher wants to understand, describe, and explain.
Typical and atypical observations	When crafting observations, a researcher can select observations that are typical in an empirical sense (common in the world) or in a scholarly sense (commonly studied in the literature). Or they can select observations that are atypical in an empirical sense (rare in the world) or in a scholarly sense (rarely studied in the literature).
Unit of observation	A unit of data collected (e.g., interviewing a person, attending a protest, witnessing a court hearing).

In *For the Family?*, Damaske (2011) sought to understand the process of women entering and leaving paid work. Damaske designed an in-depth, life history interview study with 40 working-class and 40 middle-class women, seeking variation by marital and parental statuses. Unlike most qualitative researchers, she recruited subjects through a random sampling process using the New York City voter registration database and tract data from the 2000 US Census. These observations allowed her to pinpoint how social class interacted with other social statuses, which Gerson & Damaske (2020, p. 52) call "the logic of systematic controls and comparisons." Her sampling frame also allowed her to generalize to a broader population of interest.

Such empirical generalizability is not common, but neither is it absent in qualitative research; the American Voices Project, for example, uses probability sampling (Alexander et al. 2017) to provide what its designers have thought of as a qualitative census. And some projects use mixed methods, fielding both random population surveys and corresponding interview projects (for more on large-*n* cross-case research, see Elman et al. 2016). Streib (2020), for instance, drew upon interviews conducted as part of the National Study of Youth and Religion (NSYR) (a probability sample) to understand how and why some young adults experience downward social mobility. Her claims should be empirically generalizable to the population of young adults as defined by the sampling frame of the NSYR, conditional on the same set of criteria used for evaluating quantitative work from that instrument: selection into the sample, how raw data are transformed into

data for analysis, quality of analysis, etc. Powerfully for Streib, others can evaluate her findings because the data she uses are publicly available.

For most qualitative work, however, researchers eschew empirical generalizability in favor of conceptual generalizability. Haynes & Solovitch (2017) also studied the case of downward mobility, focusing on racial dynamics, using radically different observations than Streib: Haynes's own family. Haynes's grandfather earned a sociology PhD in the 1910s and cofounded the National Urban League. His grandmother was a respected social scientist and author. Together they purchased a brownstone in Harlem. The book draws upon family records, interviews, and observations to show how structural racism, urban transformations, and twentieth-century public policies made Black families more likely to experience downward mobility. Haynes & Solovitch (2017) and Streib (2020) use different data to make different kinds of claims about the same case of downward mobility. While making no empirically generalizable arguments, Haynes & Solovitch provide valuable conceptual generalizability about the dynamics of elite Black families and their structural challenges in US society.

Question *b*: What Is the Phenomenon of Interest a Case Of?

Generalizing work conceptually beyond particular descriptions requires deciding, as Luker (2008, p. 51) does, "What is this a case of, anyway?" "This" means "the phenomenon of interest." One phenomenon of interest could be racism, but casing racism would mean taking up a more specific instance of this phenomenon, perhaps focusing on its structural dynamics or how it is enacted through interactions. Becker's (1998, p. 174) example of "Bernie Beck's trick" (referring to his colleague Bernard Beck) in his book, *Tricks of the Trade*, makes answering "What is this a case of?" easier: Describe what you are interested in, without using any of the major identifying words. This requires the scholar to shift the level of abstraction from the topic of interest toward the case it exemplifies. In *Privilege*, Khan (2011) would be asked to describe his project without using the words "elites" and "boarding school," and express it as how meritocratic logics have influenced patterns of inequality, particularly among institutions historically established for the socially advantaged. In practice, the answer to this question changed over the course of Khan's project, as he encountered surprises like new racial patterning within the institution; this led him to drop his initial case construction of social reproduction within schools. Ultimately he decided his work was a case of "elite cultural dynamics." Answering the question "What is this a case of?" captures the broad theoretical question at hand, moving the researcher from a general research interest and closer toward a conceptual research question (Luker 2008).

A clearly defined case is not a prerequisite for embarking on a qualitative project; many researchers simply start with a phenomenon of interest that warrants study (see Katz 1997). Becker (1992) makes a positive argument for having a highly provisional initial answer to "What is it a case of?" and asserts that such ambiguity leaves the researcher more open to the specifics of their empirical observations, thereby generating more rigorous, grounded research. Becker insists that when a scholar feels uncertain as to what their research is a case of—when they are mired in data, lost in the trees (observations), and grasping to see the forest (case)—they are likely on the right track. Scholars can also share a phenomenon of interest and make similar observations, all the while pursuing quite different cases. For example, an interest in panhandling on the street could be a reflection on community life (Duneier 1999), a street economy (Gowan 2010), or gender policing (Robinson 2020), each of which would suggest a different constellation of useful observations.

Defining cases clearly is fundamental for conceptual generalizability, even if a scholar only fully identifies their case at the end of the research process. Empirical observations may be quite different, but conceptual patterns of cases should, roughly, be the same. If they are not, new explanations or concepts are required. For example, in looking at housing dynamics among the urban

poor, observations in Houston, Austin, Chicago, Los Angeles, San Francisco, Boston, Philadelphia, and New York are very different (Anderson 1992, Auyero 2015, Deener 2012, Gans 1982, Gowan 2010, Pattillo 1999, Robinson 2020, Stuart 2016, Whyte 1993). This is because each context has a relatively unique ecology. These cities' racial compositions, their geographic outlines, their political economies, and even their weather impact how urban poor residents experience housing. For a qualitative researcher, such empirical variation across observations is to be expected, and empirical generalizability is unlikely. However, conceptually, the patterns should, to a significant degree, be consistent. When they are not, either new cases emerge, or understandings of existing cases require refinement. Qualitative case construction allows for such conceptual generalizability. Novel conceptual patterns require modifying or extending the theories sociologists use.

Take a recent article by Besbris & Korver-Glenn (2023). After years of separate ethnographic observations with home seekers and real estate professionals, they joined forces to examine the case of housing inequality. Their specific empirical observations in Houston and New York were quite different, but their conceptual argument applied to both settings: Housing valuation is both malleable and highly patterned. Because existing theories did not adequately explain how valuation (their phenomenon of interest) impacts housing inequality (their case), the authors developed the concepts of value fluidity and value anchoring, which explain how valuation happens and better explain how this process reproduces racial and spatial housing inequality. Making their case clear enables readers to understand how Besbris and Korver-Glenn's arguments are conceptually generalizable. It also empowers other researchers to examine value fluidity and anchoring in new settings and to refine or complicate the generalizability of these concepts with future studies.

Question *c*: What Is the Analytic Lens?

Analytic lenses structure how researchers examine their case (Jerolmack & Khan 2017, 2018). These lenses are sensitizing devices (Blumer 1954) that influence the questions asked and claims generated, in part because they structure the observations a researcher makes. Qualitative scholars use different kinds of analytic lenses: studying a particular subset of people, perhaps based on their membership in a group with shared beliefs or experiences (e.g., top earners in hedge funds; Neely 2022); location in a given geographical place (e.g., mobile home parks; Sullivan 2018); or participation in a particular set of relations (e.g., landlords and tenants; Desmond 2016), a process (e.g., carceral control; Ellis 2023), a trend (e.g., investments in frontier markets; Hoang 2022), an organization (e.g., a startup; Mickey 2019, Shestakofsky 2024), or an institution (e.g., racism embedded in a criminal court; Clair 2020, Van Cleve 2017). The lens often evolves throughout the research process, because observing the phenomenon of interest will likely change how a researcher conceptualizes and constructs the case.

Trying to explain a process, for instance, requires specific kinds of observations. In *Pedigree*, Rivera (2015) explored the processes of recruitment and hiring to better understand the reproduction of inequality among elites (her case). This case had been studied before in schools and workplaces (see, for example, Khan 2011, Lamont 1992), but Rivera explored the transition between the two: the labor markets in which people from affluent backgrounds get elite jobs. Rivera focused her analytic lens on the recruiting and hiring processes and crafted observations of the different actors and situations involved. This lens was different from an organizational lens, which may have led her to look at the structures and dynamics of the hiring firms' environments. Instead, her processual and relational lens guided Rivera to observe the recruiting process at top-tier investment banks, consulting firms, and law firms, conducting in-depth interviews with 120 hiring professionals and 32 job seekers and field observations at university job fairs and a firm's recruiting department. She then pinpointed the process through which employers craft and measure

sorting criteria—cited as evidence of individual merit, work ethic, and potential—in ways that are indicative of parental income and education. This "how" approach was largely descriptive.

But Rivera's claims did not stop there: She sought to explain why this cultural matching occurs and helps to explain her case—the reproduction of inequality among elites. Answering the "why" question moved Rivera from describing processes to leveraging structured comparisons within her observations to make more general conceptual claims. Rivera exemplifies what Katz (2002) describes as the act of moving from thick description to logical explanation—that is, moving from making an empirical observation to generating a conceptually generalizable claim about a case of a phenomenon.

Question *d*: Are the Observations Typical, Atypical, or Both?

In crafting a project, scholars may ask, "What do I want to know about what we already know, and how do I want to design my study in a way that allows me to build upon and contribute to that knowledge?" To do so, scholars may craft observations that are typical or atypical. We mean typical and atypical in two senses: from an empirical perspective and a scholarly perspective. Empirically typical observations are those that are common in the world, in the sense that they represent a large, prevalent, or familiar part of a population of interest. For instance, Misra & Walters (2022) interviewed low-wage retail clothing workers—an ordinary service sector job in almost every town across the United States—to understand the gendered and racialized dynamics of workplace inequality (for a different approach to studying the same case, see Wingfield 2023). Observations that are typical in a scholarly sense are those that are commonly studied in the literature. Chicago is a typical field site for qualitative observations not because it is typical of cities in general (empirically typical) but because it is a place where qualitative knowledge is frequently developed. Observing such a most likely context is ideal for evaluating a previous set of empirical findings and, primarily, conceptual explanations (Flyvbjerg 2006).

When Lareau (2003) embarked on her classic study *Unequal Childhoods*, the existing research identified a link between upbringing and achievement but lacked specific, testable explanations for why (Naderi et al. 2010). Also, little research had studied Black middle-class families (a notable exception was Pattillo 1999). To better understand how race and class contributed to intergenerational inequality, Lareau and her team interviewed and observed 88 empirically typical Philadelphian families (including 18 Black and 18 white middle-class families) who had a 9- or 10-year-old child at the time (for more on intensive family observations, see Lareau & Rao 2022). Her book focused on 12 families she deemed representative of the broader group: These families were typical of other low-income, working-class, and middle-class white and Black families. While race played an important role in family life, Black and white parents alike transmitted similar long-term advantages in education and occupation (Naderi et al. 2010). By including observations of typical Black middle-class families, Lareau constructed a case of inequality in children's academic achievement that challenged existing theoretical explanations of the role of race and class in the reproduction of intergenerational family inequality.

Whereas Lareau's work demonstrates the explanatory value of typical observations, another approach is to select an atypical case that is relevant for its explanatory power (Mitchell 1983). One avenue is to investigate a context about which little is known, whether in the scholarly or empirical sense. Crafting observations from an atypical context to clarify new dimensions of the social world is at the heart of much qualitative research—be it Brown-Saracino's (2017) ethnography of how lesbian, bisexual, and queer women forge new homes and identities in small cities (cities often overlooked in research on queer places) or González-López's (2015) study of incest and sexual violence in Mexican families, spurred by highly committed activists who implored her to shed light

on this phenomenon. These latter observations were atypical in a scholarly sense, insofar as they were rarely studied previously, but typical in the empirical sense, because social workers' clients commonly recounted this abuse. Atypical observations can open up entire new subfields of inquiry while also helping to reveal bias or assumptions within an existing literature that overgeneralizes from typical cases.

Ermakoff (2014) has argued for the value of these atypical (or what he calls "exceptional") observations within social analysis. Be they rare, unusual, unexpected, or unprecedented, we suggest atypical observations offer five primary contributions, the first three of which we take directly from Ermakoff's work. First, they reveal the limits of and problematize existing categories and classification systems (Pacewicz 2022), such as qualitative work on transgender (Schilt 2010), gender expansive (Robinson 2020), and intersex people (Davis 2015). Second, they identify new types, such as emerging or changing categories, as work on queer families has done (Pfeffer 2016). Third, they magnify relations that are less visible in other settings, such as the study of elites (Blair-Loy 2005, Khan 2011, Neely 2022). Fourth, atypical cases that are the least likely to occur can provide useful test cases for theory or explanation. When an atypical case does in fact hold up, then it more strongly verifies that explanation (Flyvbjerg 2006). Finally, they capture outliers that illuminate an important process, experience, or phenomenon (Emigh 1997, Golden-Biddle & Locke 1993). These cases, such as upwardly mobile working-class students, can be "exceptions that prove the rule" (Bettie 2002); that is, if all other observations play out in one way and one doesn't, it helps to explain the other, more uniform or consistent observations.

Recently, one important, understudied atypical population (both empirically and scholarly) has received more attention: transgender and gender expansive children (Meadow 2018, Robinson 2020, Travers 2018). In *Trans Kids*, Meadow (2018) approached the case of gender identity from the vantage of parents who actively affirm and facilitate their children's gender nonconformity. Whereas previous generations of parents tried to "set their children straight," Meadow's interviews and observations with 62 parents reveal how they participate in the creation of children's gender—not just in "doing gender" but also in "giving gender" [building on Ward's (2010) conceptualization]. Meanwhile, in *The Trans Generation*, Travers (2018) foregrounds interviews with 19 transgender children and 23 parents to examine how kids contend with societal policing of binary sex/gender that doesn't map onto their diverse experiences of gender. By observing people who transcend binary cisgender categories (i.e., the typical), Meadow and Travers challenge previous conceptions of how parents, schools, and society shape gender in children's lives. Such observations from atypical cases help unsettle the conceptual generalizability of theories grounded in observations made from typical cases.

Question *e*: How Does the Study Weigh the Goals of Maximal Depth and Breadth?

When qualitative researchers collect data, their aims are twofold: first, to achieve depth through maximal description, or richly describing the elements of the case that are conceptually important, and second, to achieve breadth by seeking maximal variation within the case (refer to King et al. 1994 for a more detailed discussion). "Maximal" does not mean the most possible; it means reaching saturation, such that additional observations yield little new insight (refer to Small 2009). These twin aims can be at odds. On the one hand, full, descriptive richness requires limited observations and greater detail. On the other, generating explanations requires variation with sufficient observations to evaluate trends and/or conduct more observations to evaluate disconfirming evidence of the patterns observed.

Clearly defining a case helps clarify how to address these two aims during data collection. One aim may take priority. If the scholarly community has not produced extensive knowledge about a

phenomenon, then it might not be as useful to theorize about it; instead, providing a rich description might do to more to aid our understanding. If a phenomenon is richly studied, then existing theories can be interrogated by depth or breadth. Researchers are part of a community of scholars who can take different approaches to the same case, building knowledge collectively through discrete projects. Take the well-known case of how companies control and exploit low-wage service workers (Burawoy 1982, Leidner 1993, Misra & Walters 2022, Williams 2006). Thanks to media and scholarly attention (Ehrenreich 2011), Walmart has come to symbolize the mistreatment of hourly service workers (Kalleberg 2009). Reich & Bearman (2018) sought to understand how service workers struggle for respect and greater freedom in US retail, but also why so many workers at Walmart report liking their jobs and do not look for other opportunities. This kind of observation challenged existing narratives and required a breadth of data to establish its claims. Deploying several methods and a 20-student research team, the authors strived to understand power dynamics among managers, workers, and customers across Walmart stores in five US regions. Aiming for depth instead of breadth within a similar kind of labor, Sobering (2022) asked about a more concretely defined case: how low-wage service workers create and sustain equality. For this, she selected an atypical field site to study workplace (in)equality: a worker-owned luxury hotel in Buenos Aires. Drawing from a decade of observations, Sobering crafted rich descriptions detailing how employees rotated jobs, distributed resources, and made decisions democratically. Sobering herself made beds, waited tables, and received customers. This allowed her to identify variation, such as times when workers challenged, deliberated, and reasserted practices designed to create equality.

McDermott (2006) balanced breadth and depth in her study of how working-class white people make sense of class. To observe variation in how white people experience their position relative to African Americans, McDermott worked at convenience stores where working-class white neighborhoods bordered working-class Black ones in Atlanta and Boston. In Atlanta, where there is a sizable middle- and upper-class Black population, she found that white people were more likely to experience their working-class position as a failure. Absent such a Black population in Boston, working-class white people felt more positive about their class. The breadth and depth that McDermott provided was not total; it was tied to her design and case construction. She did not, for example, tell us everything she could about these white communities, but narrowed her observations and claims to those indicated by her case (white racial identity) and analytic lens (microinteractions and place).

Question *f*: How Does the Study Structure in Strategic Comparison?

A central tenet in the scholarly enterprise is that generating explanations requires variation. Qualitative researchers seeking conceptual generalizability need to be able to identify, describe, and explain variations in their observations. This requires some form of structured comparison. Stockstill (2023) did not initially plan a comparative design in her ethnography of day care centers; she began by looking at centers for lower-income children of color. But, as she notes in her methodological appendix, it was through observations and data analysis that she realized institutional factors were likely shaping her observations. Making claims about such institutional factors required variation, so she undertook observations about a different, predominantly white child care center that served a more affluent population. Although McDermott and Stockstill both employed comparative designs, this is not essential for strategic comparison. Comparisons can be formally structured into the design, arise informally as part of gathering data, or both.

Our account of structured strategic comparison is informed in part by the analytic technique of constant comparison, which is proposed by the inductive, grounded theory tradition [Glaser & Strauss 2017 (1967), Mitchell 1983], but it is certainly not limited to this theoretical approach.

When entering the field, scholars identify emergent conceptual categories or abstractions from their data, and then they begin comparison. A researcher compares their observations in a given category to refine their preliminary concepts. And this initial coding points the way toward additional relevant data to collect—a process Gerson & Damaske (2020) call theoretical sampling. In this way, data collection, analysis, and interpretation are intertwined.

Luker (2008, pp. 104–6) outlines three general principles that help us see these processes at work: comparing observations to the "conventional wisdom," to a "tacit control group," and/or to a theoretically driven comparison. Vaughan's (2008, p. 66) structured comparison method of analogical theorizing involves "developing theoretical explanations by cross-case analysis that compares similar phenomena in different social forms that vary in size, complexity, and function." This need not rely on entirely novel data collection: Analogies can involve bringing in case studies conducted by other scholars. For example, Moore's (2011) *Invisible Families* examines Black lesbian women's experiences of motherhood because they were often omitted by traditional qualitative recruitment methods in studies of lesbian women. The previous research, Moore explains, centers the experiences of white lesbians, which tends to leave out women who became mothers prior to entering a lesbian partnership. By including these Black lesbian mothers omitted by scholars and comparing their experiences against those classically presented in the literature, Moore challenged theories about the experience of motherhood and the community support lesbian mothers receive.

Vaughan (1997, 1998) starts by situating the individual and interactions within a particular context—organizational, institutional, environmental, etc. She then selects comparative cases relevant to the initial case: e.g., similar events in different settings, shifting levels of analysis, observations in distinct complex systems, and varying social forms. Depending on how boundaries around the case are drawn, similarities and differences will be either brought forth or limited (Vaughan 2014). The similarities provide some theoretical confirmation, while the differences point to the need to innovate new theory. She notes that shifting the analytic lens across cases is key to theory building.

Building on Vaughan's analogical comparison, we present examples of three ways to approach a structured comparison: with a matrix comparison, contextual comparison, and within-group comparison. A matrix approach allows for straightforward analyses across groups by ensuring that there are adequate numbers of cases in each cell to offer sufficient data to compare across categories (e.g., Musto 2019, Rao 2020). For example, recall how Damaske (2011) examined the interactions among marital, parental, and class statuses in women's employment or how Lareau (2003) employed a 2 by 3 matrix: white and Black families classified as poor, working-class, and middle-class. In these examples, each author made a structured comparison of social class position while considering how class interacts with other social categories, such as race, parental, and marital status. One critique of the matrix structure is that it can reify the social categories under investigation, rather than letting them emerge in the observations of real-world social phenomena (e.g., Lorber 1993).

A second approach is to compare the same group of people in different contexts to understand more precisely what is similar and dissimilar about their experiences. By studying broadly analogous experiences of similarly situated people but varying the social setting, a researcher can better isolate and identify the factors, processes, or mechanisms that shape these experiences. Collins (2019) compared the experiences of middle-class working mothers across four country contexts (Sweden, Germany, Italy, and the United States), allowing her to clarify how work-family policies and cultural attitudes shape the ways otherwise similar women navigate employment and motherhood.

In the third approach, within-group comparative research, the goal is to examine a particular group by crafting observations that maximize the diversity of experiences within that group. What

exactly counts as diversity may be structured in advance or identified iteratively, both through prior research on the topic and through discovery in the field. Small & Calarco (2022, p. 47) call this heterogeneity, referring to "the degree to which the perceptions, experiences, motivations, and other aspects of the population or context studied are represented as diverse." This heterogeneity can be structured into case construction at the onset of data collection, as Moore's (2011) research demonstrates, or it can be developed iteratively throughout data collection, as we explore in the next section.

A rich investigation into within-group heterogeneity is central to applying the theory of intersectionality (Collins 2000, Crenshaw 1991). The goal is to challenge categories by identifying the boundary-making processes (McCall 2005) that construct relations of power (Choo & Ferree 2010). McCall (2005, p. 1774) calls this "intracategorical complexity" because it involves examining groups often elided in categorical analysis (e.g., the category of "woman" or people who are gender expansive) "to reveal the complexity of lived experience within such groups." In this tradition, within-group comparison may challenge the coherence or "groupness" of certain conceptual categories. These comparisons do not always happen in data collection; a researcher can also compare their findings to those of previous studies.

Moore's (2012) study of Black lesbian mothers again provides an illustrative example of intracategorical complexity and intersectionality. Within this case, she examined the wide variation in mothers' experiences, which might have been ignored in a study of lesbian mothers more broadly. For instance, in addition to Black lesbians who became mothers as a couple—often the focus of prior studies of lesbian, gay, bisexual, transgender, and queer (LGBTQ) parents—she identified how mothers in stepfamilies and single mothers have their own unique experiences. This variation also allowed her to identify how race, gender, and sexuality, when considered together, can reveal how what appears assimilative can be transformative: Coupled Black lesbian women effect change through, for example, the division of labor in their families and the meaning gleaned from transforming that labor. All these approaches to comparison help optimize the likelihood of variation needed to generate convincing sociological explanations.

Question *g*: How Are Observations Constructed Iteratively?

Qualitative research tends to be iterative: Constructing cases and observations changes throughout the research process (refer to Becker 1992, Bourdieu 1991, Ragin 1992b). Observations often lead scholars to home in on a class of phenomena that, previously regarded as irrelevant or unimportant, are seen to be essential. Take Auyero's (2012) *Patients of the State*: During fieldwork in Argentina, Auyero observed the tremendous amount of time poor people spend waiting to receive state assistance—a phenomenon that had yet to receive much scholarly attention but, he argued, operated as an important strategy of state control. Auyero's original case was not the politics of waiting, but he iteratively constructed this case the more he spent time with people trying to secure better housing or receive identification cards.

Crafting observations iteratively allows for a practice Timmermans & Tavory (2022, p. 2) call "abductive reasoning," a "mode of inference drawing from surprise" that applies to not only data collection but the entire research process. Applying a similar logic, Small (2009, pp. 24–25) notes that the qualitative logic of selection "proceeds sequentially" throughout data collection so that each interview or field observation serves as a single case study that "provides an increasingly accurate understanding of the question at hand" (refer also to Grodal et al. 2021, Yin 2013). The goal is to reach saturation. Structuring in "pauses" during data collection to reflect upon what has been observed, as suggested by grounded theory's constant comparison, can help meet this aim. Pauses allow a researcher to assess the depth of descriptions in the data they've already gathered, the variation those observations reflect, and the potential utility of collecting new material

for subsequent argumentation. Such pauses may lead to a shift in the case that structures future observations. They also allow the researcher to reflect on the theoretical implications of unanticipated observations, what Timmermans & Tavory (2022, p. 3) call moments of surprise that, much like atypical observations, prompt us to reconsider "what surprising observations are a theoretical case of, and where the theoretical case and findings diverge in interesting ways."

Changing phenomena of interest and/or cases as a result of this kind of iterative emergent variation can be unexpected, or a researcher may have an inkling about it at the outset. Besbris (2020) suspected that real estate agents interacted with very wealthy and average-income buyers differently, but given his case of housing inequality, his initial phenomenon of interest was on how these agents get deals done in general. It wasn't until after a few months in the field that Besbris realized that rates of upselling varied widely depending on the buyer's wealth. While Besbris had an idea that there would be differences, he was unsure how they might matter. Upselling was not his initial focus. Besbris's study makes clear that iterative within-group variation can offer valuable clarity and generate new knowledge about even well-studied phenomena.

Iteratively constructing cases and observations is especially important with emergent or changing groups, such as, for example, lesbian, gay, bisexual, transgender, queer, and intersex populations. LGBTQ groups are often too small, unspecified, and in flux for scholars to draw statistically representative samples; these groups may defy measurement in the quantitative sense, requiring that scholars apply a queer lens to consider how they might best gather and analyze empirical data on people's experiences (Compton et al. 2018).

In their ethnography *Coming Out to the Streets*, Robinson (2020) examined LGBTQ youth experiencing homelessness. Robinson volunteered at two youth shelters, one designated for LGBTQ youth, and interviewed 40 LGBTQ youth experiencing homelessness and 10 service providers. Their interview with Zoe, a Hispanic heterosexual transgender woman, revealed the limits of the common explanation for youth homelessness—that the child's coming out leads their parents to reject (and eject) them for being lesbian, gay, or bisexual. Instead, thanks to Zoe and other transgender and gender-expansive interviewees, Robinson (2020, pp. 4–5) continued to focus on gender-expansive youth, leading them to conclude that "LGBTQ youth homelessness involves the policing of expansive expressions of gender and how these practices intersect with sexuality, race, and class to influence the youth's lives."

Another study, which shifted the focus from adults to young people, demonstrates the value of an iterative study design. In *Black Picket Fences*, ethnographer Pattillo (1999) emersed herself in a Chicago Black middle-class neighborhood, talking to people of various ages throughout the community. Over time, she homed in on youth as an "indicator of the well-being of black middle-class families more generally" (Pattillo 1999, p. 7). Pattillo shifted her focus from the neighborhood to the families, allowing her to generalize conceptually to other families in similar communities. She analyzed relationally how the younger generation's life chances had changed as industrial decline caused economic fragility and downward mobility. By making a wide range of observations, from local church leaders to younger people experimenting with illicit activities, Pattillo (1999, p. 11) revealed how personal ties that spanned "across class lines, across lifestyles, and across the law" helped people protect one another from crime, violence, and policing. Examining various community stakeholders iteratively revealed that age-cohort, indicative of socioeconomic change, was key to understanding the experiences of Black middle-class families.

CONCLUSION

In this review, we argue for the importance of two elements to qualitative research: the construction of cases and observations within cases. Using methodological exemplars in the field of

qualitative sociology, we outlined seven questions researchers ask as they construct qualitative cases to examine a phenomenon of interest, identify observations to make within those cases, and develop explanations that help sociologists better understand the case. We also provided clarification of the language of qualitative research with vocabulary that elucidates the myriad decisions involved (see the sidebar titled Constructing Cases and Observations). Throughout, we built on sociologists' recent efforts to better articulate the practice of qualitative sociology (Gerson & Damaske 2020, Lareau 2021, Small 2009, Small & Calarco 2022) for a clearer understanding of the questions that researchers can ask when crafting their own projects and that readers can consider when evaluating qualitative research.

With respect to evaluating qualitative research, it is important to emphasize that the explanatory power of conceptual generalizations is roughly equivalent to the power of any case. Observations about cases can be generalized to other cases. As cases are not empirical realities but conceptual abstractions, generalizability works at this conceptual level. Crucially, generalization is not the sole aim of sociological inquiry. Accurately describing a phenomenon of interest is a sufficient warrant for undertaking research (Besbris & Khan 2017); so, too, is using description to challenge or add to existing frameworks.

While we have made inroads in the collective endeavor to further articulate and translate qualitative practice, many fruitful directions remain unexamined in our review. Further attention to the role of reflexivity (Bourdieu 1992, Fine 1993, Reich 2021, Reyes 2020, Stuart 2017), including social position and embodiment (Adjepong 2019; Hanson & Richards 2019, 2022; Williams & Heikes 1993) in shaping case and observation construction would enhance our understanding of how the researcher interacts with the social worlds they study and the consequences for the kinds of arguments they make. To date, queer and antiracist methods have charted the way for interrogating researcher positionality in this effort (Adjepong 2019, Pfeffer 2018, Robinson 2022, Smith 1999). Another important gap lies in how the coding process (Charmaz 2006, Deterding & Waters 2021, Dohan & Sánchez-Jankowski 1998) shapes argumentation in qualitative research. More research is needed on methodological innovations, including studies using existing sources (Alexander et al. 2017, Streib 2020) and online and offline data (Small 2022, Stuart 2020). Crafting and refining a shared language for these methodological processes and innovations will help future researchers as they tackle common—and new—obstacles in qualitative research.

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