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Telling Organizational Tales: The Extended Case Method in Practice

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Abstract

The extended case method brings existing theory to bear on a particular ethnographic case, enabling complex macro-level questions to be examined through their everyday manifestations in micro-level social settings. Yet it remains comparatively underutilized among organizational researchers, many of whom may be deterred by an apparent lack of practical guidance. The article addresses this by outlining three main steps, illustrated by the authors' own experience of implementing the extended case method in a recently published organizational study. In so doing, the article makes clear the distinctiveness of the method, particularly compared to the better-known grounded theory approach to ethnography. It concludes that by offering a bridge between interpretive and critical approaches, the extended case method represents a valuable addition to the toolkit of organizational researchers.

Keywords

critical theory, ethnography, extended case method, methodology, participant observation

The great C. Wright Mills (1959) suggests the relationship between the "personal troubles of the milieu" and the "public issues of social structure" lies at the heart of all social research. Likewise, Giddens (1984) says social structures are created, maintained, and changed through actions, while actions are given meaningful form only against the background of structure. Organizational researchers focus particularly on how individuals construct organizational structures, processes, and practices, and how these in turn shape social relations (Clegg & Bailey, 2008). But how can we explore this connection in practice and develop theories that connect meanings with structure?

The potential of ethnography to explore the connection has long been recognized. Characterized by a prolonged period of fieldwork, ethnography enables us to explore complex challenges by looking at their on-the-ground manifestations in the everyday lives of individuals and groups (Hammersley & Atkinson, 1995). Applied to organizations, it contributes to our understanding of how people

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Table 1. How to Apply the Extended Case Method.

1. Identify a "good" theory and a case (individual group, organization, or community) that is likely to both confirm and challenge the theory
2. Examine the daily lives of people within the chosen setting and identify any anomalies
3. Rebuild the theory to accommodate anomalies

Source: Adapted from Burawoy (1998) and Burawoy et al. (1991, 2000).

make meaning, manage change, and exert or resist power, for example (see reviews by Hodson, 1998; Ybema, Yanow, Wels, & Kamsteeg, 2009). However, the challenge lies in casting beyond the specific and unique ethnographic context to anchor individual micro studies—such as Pettigrew's (1985) classic study of change at ICI or Barley and Kunda's (1992) examination of managerial discourse—to the wider macro-social relations within which they are embedded.

The extended case method aims to do just this. Popularized by sociologist Michael Burawoy (1998), key social, economic, or organizational questions are explored through their incarnation on the ground in a particular setting, such as a factory, company, or community. Crucially, the link between the macro-level context and micro-level action is established via preexisting theory, which clearly separates the extended case method from the better-known grounded theory approach to ethnography. For example, Burawoy (1979) applied Gramsci's theory of hegemony to his experiences as a machine operator in a Chicago factory to explore how workers routinely consent to their own apparent exploitation. His study illustrates that the extended case method is not a logic of inquiry for case studies in general, but rather a method for treating cases in a particular way (Lichterman, 2002).

Table 1 summarizes how the extended case method is implemented. The researcher draws on multiple sources of data—participant observation, interviews, archival research—to illustrate how people and communities both experience and shape their environments (Samuels, 2009). Potential anomalies between the theory and what "actually" happens on the ground are identified and then used to "rebuild" the theory. As such, the method represents a useful way to explore complex research questions by looking at their everyday manifestations. But it also helps us test and refine respected academic theories.

The approach is widely used by sociologists and anthropologists but has received comparatively little attention from organizational researchers. Given its reliance on participant observation, interviews, and other methods, the extended case method is perhaps not recognized as a distinctive qualitative approach. Likewise, organizational researchers may be deterred by an apparent lack of practical guidance about how to carry it out. Consequently, this article has three main aims. First, it illustrates the relevance of the extended case method to organizational studies by setting out its key characteristics and making clear how it differs from grounded theory in particular. Second, this article outlines how the three stages identified above might be implemented, drawing on the authors' own experience of using the extended case method in a recently published study of business/nonprofit partnership. Finally, potential pitfalls are discussed. The article opens with a brief background of the method.

Evolution of the Extended Case Method

The extended case method originated within the so-called Manchester school of social anthropology in the 1950s, led by Max Gluckman (1958). Anthropologists traditionally focused primarily on how societies were organized through systems such as kinship and religion. But the Manchester anthropologists were more interested in what people were "actually" doing, which often conflicted with what they "ought" to be doing. For example, Van Velsen (1960)—under whom Burawoy trained—explored why so many villagers from a Malawian community violated traditional marriage patterns. Participant observation revealed the impact of high levels of migration to South African mines,

which in turn were accelerated by the policies and institutions of the colonial government and mining industry. So in contrast to the tidy but sometimes unrealistic anthropological monographs that had gone before, the extended case method represented a way to capture the internal and external contradictions to which communities were subject and restore them to their broader global context (Burawoy, 1998). At the same time, by documenting and stringing together multiple reports of conflicts between expected and actual behavior, researchers could begin to reconstruct the relevant theory to accommodate the anomalies identified (Tavory & Timmermans, 2009).

However, this increased focus on the specifics of particular conflicts necessitated a redefinition of what constituted a case and how it should be used. No longer merely an empirical illustration, the case becomes the source of illuminating theoretical insights (Mitchell, 1983). A focus on a tribe, organization, or area is replaced by an analysis of social process. So what Tavory and Timmermans (2009) describe as the "supersizing" of anthropological ambition depends conversely on the researcher undertaking more intensive fieldwork within a smaller unit, which is both relevant and meticulously documented.

The most commonly cited exemplars of the extended case method have been within sociology, in two collections produced by Burawoy and his students (Burawoy et al., 1991; Burawoy et al., 2000). The first volume explores how people confront the threats and disruptions of contemporary life, through ethnographies of AIDS activists, union organizers, and bakery workers, among others. The second focuses on "global ethnography," namely, the mutual interaction of global forces and the local struggles of groups including Irish software developers, Hungarian environmentalists, and Indian nurses in the United States. Both books introduce disparate ethnographic portraits under interrelated themes. These volumes bring richness to theoretical discussions of globalization, but there is little systematic attempt to link the component stories together via an overarching theoretical narrative or cross-referencing between the contributions.

A limited number of management researchers have recognized the potential of the extended case method as a means of theory building, data collection, and analysis. For example, Danneels (2010) explores how typewriter firm Smith Corona confronted the evaporation of demand for its core product, applying and adapting dynamic capability theory. Similarly, Silberzahn and Midler (2008) examine how firms deal with uncertainty about as-yet-unknown markets and technologies, by integrating the entrepreneurial theory of opportunity and product development theory with a longitudinal case study of a small European software firm. Within organizational research more specifically, there is little reference to the method. However, there is some evidence of researchers employing an extended case method type of approach without labeling it as such. For example, Plowman et al. (2007) explore the role of leadership within a struggling and unremarkable urban church as it underwent a radical transformation through which it became widely recognized for its distinctive ministry with homeless people across the city. Using Marion and Uhl-Bien's (2001) theory of leadership in complex organizations, they find that in contrast to the assumptions that underpin traditional views of leadership, leaders under such conditions enable rather than control, by disrupting existing patterns of behavior, encouraging novelty, and making sense of emerging events for others. The study relies on interview data rather than participant observation. However, the authors' approach is recognizably akin to the extended case method: They examine the complex macro issue of leadership through a focus on a particular organization, simultaneously testing and refining Marion and Uhl-Bien's framework.

Likewise, Pratt and Rafaeli's (1997) study of the role of organizational dress within the rehabilitation unit of a large hospital employs an approach that resembles the extended case method. They describe their technique as action research: They participated in a task force set up to resolve an ongoing debate about changing the unit's dress code, as well as observing and conducting semistructured interviews with people across the unit. The study extends existing theory—including that developed by Albert and Whetten (1985) and Ashforth and Mael (1996)—by highlighting how dress

Table 2. Comparison of the Extended Case Method and Grounded Theory.

	Extended Case Method	Grounded Theory
Mode of generalization	Reconstructing existing theory	Discovering new theory
Explanation	Genetic	Generic
Comparison	Similar phenomena with a view to explaining differences	Unlike phenomena with a view to discovering similarities
Object of analysis	Situation	Variables
Causality	Indivisible connectedness of elements	Linear relationship between variables

Source: Adapted from Burawoy et al. (1991).

serves as a vehicle for representing and negotiating multiple and competing organizational identities, both within the nursing profession and more widely.

The above studies provide some insight into the appeal of the extended case method. It "applies reflexive science to ethnography in order to extract the general from the unique, to move from the 'micro' to the 'macro'" (Burawoy, 1998, p. 5). As such, it is a hybrid method that recognizes both the micro-level world and the external structures that shape or constrain daily life (Samuels, 2009). This helps it to overcome a well-recognized limitation of critical theory in particular, namely, the lack of colorful stories that are told in its service (Putnam, Bantz, Deetz, Mumby, & Van Maanen, 1993). By contrast, Eliasoph and Lichterman (1999) describe the extended case method as a "splendidly theory-driven, politically engaged, macroscopic approach to everyday life" (p. 228). Perhaps not surprisingly, then, there have been calls for its more widespread use within organizational studies and the management field more generally. For example, Matthyssens and Vandenbempt (2003) suggest that the extended case method is especially useful when dealing with complex issues and unstructured phenomena. A case in point might be that of organizational change: Bjerregaard (2011) suggests that by highlighting how local institutional forms emerge and become legitimate in response to macro-institutional demands, the extended case method enables a multilayered approach, which would complement the emphasis on rhetoric and discourse that currently prevails in studies of organizational change. This article will later consider specific organizational topics and theories that might benefit from this approach. However, the next section highlights the relevance of the extended case method to organizational studies in general by setting out its distinctive characteristics.

Key Characteristics of the Extended Case Method

As mentioned above, the extended case method is a hybrid approach. At the epistemological level, it draws from both social constructivist and critical theories of science (Samuels, 2009). It adheres to the social constructivist tradition in that it focuses on describing and understanding how individuals interact with each other and acknowledges them as active agents who both respond to and change the nature of the environment in which they find themselves. However, it is more strongly associated with critical theory, which draws on the dialectic tradition of Marx and Hegel to analyze the historical and structural forces that shape society as a whole. The extended case method represents a way to locate everyday life in its extralocal and historical context (Burawoy, 1998). This eclecticism is also evident at the practical level, where its reliance on participant observation, interviews, and other methods creates significant overlap with other qualitative approaches identified by Cresswell (2003) and others, such as phenomenology, narrative research, the "traditional" case study, and—in particular—grounded theory (see Table 2 for a summary of key differences). However, the extended case method is rendered distinctive by at least three interrelated characteristics: its "big picture"

ambitions, a particular interpretation of the nature and role of theory, and a dialogic approach to the research process.

The Link Between Micro and Macro

The extended case method does not seek to generalize but nonetheless attempts to explain its findings with reference to the wider context. Burawoy et al. (1991) suggest that by using general concepts and laws about states, economies, legal orders, and so on, we can understand how a particular empirical situation is shaped by wider structures. Danneels's (2010) study of Smith Corona, for example, presents a rich portrait of an embattled firm undergoing liquidation and struggling to respond to the increasing obsolescence of its core product. But the usefulness of the study lies in the way it illuminates the wider "resource alteration processes" that can enable organizations to survive and prosper in the long term.

The extended case method aspires to *genetic* explanations, or explanations of particular outcomes. That is, "the importance of the single case lies in what it tells us about society as a whole rather than about the population of similar cases" (Burawoy et al., 1991, p. 281). Consequently, it focuses on the *differences* between otherwise similar cases, for example, "why outsourcing has had varying levels of success across the banking industry." This contrasts with the approach taken by grounded theory, which seeks *generic* explanations, by looking for similarities among disparate cases and using them to elaborate theory, for example, "all organizations tend towards hierarchy" (Burawoy et al., 1991). Thus in grounded theory, the organization or community becomes a natural setting for recurrent patterns of social behavior, and its specific characteristics are rendered inconsequential. But to the extended case method, context is everything: The organization or community is not an arena where such patterns are played out, but a constellation of specific individuals and relationships located in time and space who respond to, resist, and thereby ultimately influence those patterns. Returning to Smith Corona, a grounded theory approach might show us the different modes available to such firms as they seek to develop their resources, for example, leveraging existing resources or creating new ones. But Danneels's (2010) application of the extended case method complements this by opening up the "black box" of dynamic capability theory and in turn extending it. In this case, the case illuminates that not only the availability of resources but also cognition about those resources affect firms' ability to adapt. It is precisely Smith Corona's deviation from what we expect—given our knowledge of the relevant theory and other similar cases—that will enable us to learn more about the bigger picture from this one study.

A Distinctive Approach to Theory

As implied above, the extended case method is characterized by a distinctive understanding of the nature and role of theory. Burawoy (1998) suggests that researchers who start from the data are condemned to reinventing the wheel. Likewise, Wacquant (2002) suggests there is no such thing as ethnography that is not guided by theory and we should therefore work self-consciously to integrate it actively at every step of the research process rather than "pretend" to discover it in the field. In this way, although research focuses on a single case, it is effectively being compared to multiple other cases via an invisible theoretical bridge. Both Burawoy and Wacquant are making an explicit contrast with grounded theory, which systematically builds theory "from the ground up" by using participant observation to access the ethno-narratives of actors on the ground (O'Reilly, Paper, & Marx, 2012; Tavory & Timmermans, 2009). Data are taken apart and reassembled into categories that in turn form a conceptual framework. So the resulting theory is essentially a stylized representation of the "folk" theories that abound in the setting under study or society more widely (Haig, 1995). Notwithstanding its reluctance to project preconceived concepts onto specific social settings, grounded

theory does reach beyond the single case. The selection of additional cases (via ''theoretical sampling'') enables grounded theories to be confirmed, rejected, or revised (Corbin & Strauss, 1990; Mjøset, 2005). Nonetheless, the extended case method retains a distinctive focus on locating social processes within the wider determining context (Burawoy, 1998).

Plowman et al.'s (2007) study of leadership within an urban church illustrates this distinctive approach to theory. Extensive data from interviews, secondary sources, and informal observations were shaped into a narrative account of the impact of leadership on the transformation at the church. This guided the researchers toward an appropriate theory—developed by Marion and Uhl-Bien (2001)—which in turn was used to code each transcript. The theoretical categories adopted—of the leader ''destabilizing things,'' encouraging innovation, and acting as sense maker—seek to locate the social processes observed within a wider determining context. In so doing, the study both tests and extends the theory. For example, the findings reveal that the individuals who actually provoked the change—by starting the Sunday morning breakfasts that effectively reshaped the organization's identity into a church that ministered to the homeless—were not leaders at all but people with no official role or authority. The leaders' role thereby became one of responding to and interpreting this change, raising questions about how this approach unfolds over time and whether it leads to failure as well as success.

Research as Dialogue

As discussed above, the extended case method is particularly associated with the critical tradition. Constructivist researchers endeavor to uncover participants' multiple realities by ''seeing'' the world from their perspective. But critical theories of science shift the focus from individual subjects to the relationships between them, emphasizing in particular the role of communication, via shared meanings, norms, and values (Habermas, 1987). Furthermore, critical research has an explicitly emancipatory commitment, aiming to make visible the structural conditions of the modern world order to challenge them. This requires a ''democratic'' research approach in which the participants' own voices are heard throughout. Consequently, the dialogic approach is not just a tactic but a way of knowing (Freire & Macedo, 1995). The extended case method enables the researchers to carry out the relevant tasks in collaboration with their subjects, resulting in ''multiple knowledges'' that reflect the position of different actors within a social situation. Burawoy (1998) suggests this amounts to the ''craft production of knowledge'': Researching and writing become opportunities to connect what is said and unsaid, weaving together the stories of different actors and forging links between different kinds of knowledge (Gupta & Ferguson, 1997; Mosse, 2006). The centrality of existing theory within this process ensures that the dialogue between participant and observer is naturally extended into a dialogue among social scientists (Burawoy et al., 1991). Of course, other qualitative methods seek to include the perspectives and voices of the people they study. The move toward constructivist grounded theory, for example, envisages the ''co-construction of data'' between observer and participant. Those practicing traditional forms of grounded theory are criticized for ''[assuming] the role of authoritative experts who bring an objective view to the research'' (Charmaz, 2006, p. 132). Nonetheless, the continued liveliness of this debate illustrates that the notion of research as dialogue is not embraced as wholeheartedly as among proponents of the extended case method.

However, the studies cited earlier make comparatively little reference to the role of participants. Silberzahn and Midler (2008) checked the validity of their insights with senior executives. Likewise, Danneels (2010) exchanged emails with the interviewees in his study of Smith Corona to revise and clarify his analysis. But in their study of how companies ''reorient'' their business market strategies, Matthyssens and Vandenbempt (2003) make no reference at all to the role played by participants across the research process. This may reflect an awareness of strict journal word counts, rather than

a lack of engagement. But researchers using the extended case method should perhaps be more explicit since only where participants are involved at all stages of the research process can the extended case method genuinely depict their organizational world.

Implementing the Extended Case Method

As well as being epistemologically distinct, grounded theory and the extended case method take different approaches to the practicalities of research. Grounded theory follows a prescribed set of nonlinear procedures, which demand a disciplined approach to comparing and coding data (Charmaz, 2006; Corbin & Strauss, 1990). By contrast, the extended case method "purposefully eschew[s] methodological 'cookbooks,' worried that they would result in a fetishization of methods and crass empiricism" (Timmermans & Tavory, 2012, p. 180). Nonetheless, this lack of guidance may be daunting to organizational researchers, so the following discussion highlights the key steps involved, referring throughout to a recently published extended case study, referred to as the Partnership Project (Wadham & Warren, 2013).

The Partnership Project was designed to explore how partnerships between business and nonprofits affect participating organizations and build mutual understanding of their respective roles in addressing challenges such as poverty and climate change. There is extensive literature on partnership as an instrumental process that enables participating organizations to pursue mutually agreed objectives by leveraging the comparative advantages of each (e.g., Ross, 2012; Selsky & Parker, 2005). So the motivation behind the Partnership Project was a desire to understand *how* this process unfolds, the effect it has on the partner organizations, and the extent to which it might reflect a shift in our understanding of the roles of business and nonprofits more broadly. This more holistic approach was pursued via ethnographic fieldwork with international nonprofit Concern Universal (CU) and its corporate partners and was undertaken over 14 months by one of the authors. An appropriate theoretical framework was found in Habermas's distinction between the lifeworld and the systemworld and his ideas about new social movements. To bring fieldwork and theory together, the extended case method was adopted as the most appropriate: It provided a way to link our findings to the broader field of cross-sector partnership, and conversely it provided a mechanism through which to empirically test Habermas's ideas "on the ground." The remainder of this section explores the three stages of the extended case method and illustrate how each was implemented in the Partnership Project, with the aim of clarifying how other organizational researchers might usefully apply the method in their own work.

Stage 1: Identify a Theory and a Case

The extended case method essentially brings together "indigenous" narratives from the field and academic theory (Burawoy, 1998). However, this raises the question of whether it is the theory or the case that "comes first." In practice, researchers most likely start out with an awareness of an overarching theme in which they are interested, which could be as general as "identity formation in organizations" or "the role of emotion in decision-making." The theme may emerge from theory, where a gap is identified in some literature with which we are familiar. Or it may have been thrown up empirically during previous studies into a particular organizational setting like family-owned enterprises or technology companies. However, most important, the field site is meaningful only insofar as it elucidates the categories of a particular theory (Lichterman, 2002). Therefore, it is theory that "extends" the case study and gives the method its distinctiveness (Burawoy, 1998). Given the extended case method's association with critical theory, its early (sociological) adherents had a tendency to graduate toward those theories that enabled them to uncover the workings of power and structural inequalities, namely, the transcendental higher order theories of thinkers like Habermas or

Marx. But as management researchers have slowly adopted the method, a wider cross-section of theories, like the strategy and leadership examples mentioned above, have been used.

The only injunction is that researchers select a "good" theory that offers novel angles of vision and whose core postulates remain intact even under sustained attempts at refutation (Burawoy, 1998). Researchers will likely choose among a selection of theoretical possibilities before settling on their model of choice. Indeed, in the very early days of the extended case method, the Manchester school's regular seminars were described as "experimental laboratories," in which people relentlessly analyzed their own and other people's data using different theoretical approaches (Frankenberg, 1981). Once the appropriate theory is identified, it defines the boundaries of the case by guiding the researcher to specific empirical instances (Tavory & Timmermans, 2009). The case is essentially a revealing setting that will build understanding about when particular theoretical conjectures will or will not hold. Practically any field site offers up clues to a variety of pertinent questions so the case may be "typical," "revelatory," or "unique" (Yin, 2003): Researchers should therefore be as transparent as possible about how the case has been selected and what they expect to find there (Lichterman, 2002).

The Partnership Project originated in an academic interest in the concept and practice of sustainability, specifically the apparent need for more sustainable and equitable models of business and development. The authors' professional and academic background in working across different sectors—business, nonprofit, unions—suggested that such models might emerge from more collaborative ways of working. This was confirmed by a literature review into the impact of cross-sector partnership, which highlighted the business/nonprofit nexus as especially significant. A pilot study of CU's partnership with horticultural company Haygrove (Wadham, 2009) described how both sides are engaged in practical efforts to help farmers in the Gambia move beyond producing crops for their own consumption to access potentially lucrative local markets. But in so doing, actors within the partner organizations are effectively negotiating a path between a dominant "economics-based" paradigm and an emerging alternative based on the principles of community, diversity, and interdependence.

This mapped directly onto Habermas's (1987, 1996) distinction between the lifeworld and the systemworld, and the "seam" between them, which therefore became an appropriate theoretical candidate. The lifeworld comprises our assumptions about who we are and what we believe and is ultimately what binds human society together. The systemworld comprises the structural subsystems of law, politics, and the economy that enable society to function effectively. These subsystems are built on the lifeworld and should therefore be subservient to it, but in practice the systemworld's dominant values of money and power increasingly "colonize" the lifeworld. For Habermas, the "conspicuous challenges" of poverty and environmental degradation are symptoms of this colonization, as public debates become distorted by self-interest and we lose sight of our real human needs. Habermas (1981) sees new social movements and the nonprofits that are key actors within them as strongly associated with the lifeworld, resisting the political and economic forces of the system and promising alternative visions of the future. By contrast, business is associated with the systemworld's dominant values of money, power, and consumption. So as the Partnership Project began, cross-sector partnership was identified as a "seam" along which the competing values of lifeworld and system were played out by nonprofit and business actors respectively. CU represented a particularly appropriate case through which to explore this potentially rich arena. Its engagement with businesses from African microenterprises to multinational firms is a defining characteristic of the organization. Its practical work in Africa and elsewhere has been recognized with a World Business and Development Award, among others. But it also contributes to wider debates in this area, for example at the annual Hay Festival for literature and the arts in western England. Fieldwork could therefore take in business/nonprofit engagement at every level from on-the-ground work with rural

communities to meetings with international companies like Marks and Spencer and the Cooperative Group.

Stage 2: Collect Data From Daily Life and Identify Any Anomalies

During Stage 1, researchers approach the case armed with a general theme and possibly a specific theory. They know—and document—what they expect to find there, based on previous research undertaken by themselves or others. However, not only are they prepared for this to be contradicted by what ''really'' happens, but they actively hope that their conjectures will be thwarted for it is precisely where real-life deviates from theory that the method can extend our understanding of a particular issue. The second step, therefore, is to collect data of people going about their everyday organizational lives in their own time and space, and then hone in on any ways in which this defies our expectations. No forms of data collection fall outside the realm of this kind of study (Samuels, 2009), so researchers make use of interviews, policy papers, and media and historical documents. However, participant observation remains the technique of choice. This is partly explained by the origins of the extended case method within anthropology and sociology. However, more fundamentally, participant observation enables rigor to be maintained in the process, discussed below, through which existing theory is extended. That is, the immersion required by participant observation gives rise to a rich picture that enables the researchers to reveal the stable underlying processes within the setting. But it also enables them to identify not just the tensions and contradictions that indicate potential anomalies, but also their own potential impact on the setting.

This reliance on participant observation means data collection within the extended case method differs little from that undertaken in the pursuit of grounded theory. Indeed, Lichterman (2002) suggests that researchers implementing the extended case method borrow from grounded theory's ''constant comparative'' method. That is, they should ''code'' their findings as they write them, and use them to anticipate what they might find in subsequent visits to the field (''theoretical sampling''). Under both methods, the case and the events that unfold there are crucial. But the extended case method is distinctive in that it assumes that we unavoidably bring tacit or explicit theoretical concepts to our observations in the field. Therefore, any given site or episode could always be theorized in many different ways, since what we ''see'' in the field depends on the theoretical lens through which we view it.

The Partnership Project relied mainly on participant observation, carried out between November 2007 and December 2008, mostly in the United Kingdom but with brief periods in the Gambia, Kenya, and Nigeria. One of the authors worked about 4 days per week supporting CU's work with business, mainly via telephone and email with CU colleagues and others, with weekly or fortnightly visits to the U.K. office in Hereford. These regular ''back-office'' activities were punctuated by several key events, including the three 10-day visits overseas, and meetings with current and potential corporate partners. Other sources of data included 49 interviews carried out with staff, trustees, and volunteers, as well as relevant emails and organizational documents. Any ethnographic study is inevitably incomplete since it is impossible to observe every possible setting or situation (Jorgensen, 1989). Furthermore, within an international organization like CU, symbols and knowledge are shared across multiple sites in several countries, making it difficult to identify who should constitute a study's informants (Gille & O'Riain, 2002). Nonetheless, extensive interaction with diverse people in different situations and locations provided insight into how people across the organization act and how they understand and experience those acts.

Silverman (2005) says fieldwork essentially represents a kind of progressive focusing, which the ethnographer must systematically manage to avoid being overwhelmed by the sheer volume of data. The extended case method makes this possible via its insistence that we effectively integrate theory into participant observation from the outset (Lichterman, 2002). As outlined above, we inevitably

bring our preconceptions—whether informed by theory or our own life experiences—to our fieldwork. By explicitly acknowledging these preconceptions, we render the fieldwork experience more manageable, as it becomes an opportunity to seek out what is interesting, surprising, or unexpected. For example, from an abundance of potential fieldwork opportunities, the Partnership Project actively sought out occasions when interactions between the lifeworld and systemworld could be captured. This resulted in a particular focus on CU's engagement with what might be understood as agents of the systemworld, namely "big" business and government actors, with fieldwork providing the opportunity to participate in meetings and calls with representatives of multinational companies and the U.K. Department for International Development, for example.

This funneling may be physically reflected in field notes. Early field notes from the Partnership Project retain a stream of consciousness feel, while those written later seem sparse and purposeful by comparison: The theoretical categories relevant to the research were becoming more clearly defined and applied, and in turn particular incidents and stories then began to stand out as potentially challenging them. For example, the nascent relationship with the Cooperative Group is captured in considerable detail. It highlights the extent to which people in CU adopt "business-friendly" language, as the colonization thesis would lead to us to expect. But at the same time this same example violates our theoretical predictions. It shows how in turn CU actors use this same language to encourage their Cooperative counterparts to reconsider their understanding of the process of community-led development, thereby challenging their understanding of the respective roles of business and nonprofit organizations in implementing these kinds of social projects. This and every fieldwork encounter was recorded in a separate document, which included a list of participants, key points (added at time of writing by way of a summary), and approximate keywords. Additional handwritten notes were added later and potentially useful sections highlighted. As writing up began, the keywords were put onto individual Post-it notes, which were then grouped under relevant theoretical headings drawn from Habermas's framework. Although lacking in elegance, this manual filtering of analytical ideas was adequate to the task and solidly reassuring.

Stage 3: Rebuild the Theory to Accommodate Anomalies

Discoveries in the field are always made in relation to one or more theories, and where the preexisting theory is unable to account for what we find on the ground, the theory must be adjusted so that it can accommodate that anomalous case. So it is during this final stage that the micro-level study can illuminate macro-level processes, resulting in what Tavory and Timmermans (2009) call "theorygraphy," that is, ethnography that is liberated from its confinement as a "quaint technique at the margins of social science" (Burawoy et al., 1991, p. 3). The reconstruction of preexisting theory, then, is the ultimate goal of the extended case method, allowing it to combine both understanding and explanation. Namely, having answered the question of "how" particular processes happen within the research setting, researchers then turns their attention to asking if the preexisting theory of those processes is adequate (Lichterman, 2002). In so doing, the extended case method moves from reporting the "voices" of the researchers' participants toward a critical interpretive analytic process (Samuels, 2009). In this way, the method explicitly requires that we uphold the complexities and tensions inherent in the topic that we are exploring. But this reconstruction all depends on the perilous challenge of identifying an anomaly.

As introduced above, the Partnership Project represented an opportunity to explore the interface between business and nonprofit actors and the extent to which it might enable more sustainable forms of business and development to emerge. Habermas's theory provided a framework though which to understand the two sides and their engagement with each other. Nonprofit actors are seen as located firmly within the lifeworld, enabling people to articulate and live out their ideals and beliefs. Business actors represent a systemworld preoccupied by money and power. According to

Habermas, these all-pervasive values dominate our daily lives through the media and mass culture, distorting public debate and leading people to define themselves and their aspirations in terms of the system rather than the lifeworld. In the context of cross-sector partnership, therefore, we would expect business actors to exert a colonizing effect over their nonprofit counterparts, undermining the possibility of such partnerships to challenge existing approaches or develop alternatives for the future. Before we entered the field, the potential anomaly had already been identified: The pilot study (Wadham, 2009) had suggested that business actors used partnership not only as a strategic mechanism through which to implement their corporate social responsibility objectives, but also as an opportunity for a more profound dialogue about the nature of the underlying social and economic challenges and the respective role of business, nonprofits, and others in addressing them. Our "research problem" therefore focused on the extent to which the influence between system and lifeworld might also run the other way and fieldwork represented an opportunity to seek out appropriate evidence for this potential anomaly. For example, early on we met a former CEO, who had taken early retirement and decided to spend a year supporting CU's work in Africa. According to Habermas's framework, he is an archetypal representative of the system, yet he describes how his experience with CU quickly challenged his own worldview:

> I naively thought that what I could contribute was to help Concern Universal and the people they work with do things more efficiently. To put it crudely, to help them get the sacks out of the plane more efficiently. But if that's all you do you're . . . not solving anything. What excited me was seeing communities working together to solve their own problems . . . . It was exciting to see how poverty had given way to income generation.

As well as exploring how the case violates our theoretical presumptions, the extended case method also requires that we explain why this might be so. Here, a key external force that affects the partnership and violates our expectations is an apparent blurring of the boundaries between the business and nonprofit sectors. This development has been noted by others. For example, Matten and Crane (2005) suggest that—especially in developing countries—business is beginning to undertake some functions that are traditionally the preserve of government and nonprofit organizations, such as providing health care or education for workers and their communities. Similarly, Scherer and Palazzo (2007, 2011) suggest that in taking on this expanded role, business is effectively challenging established ideas about the "division of labor" between the sectors, redefining the standards and expectations placed on each by the wider society. Fieldwork thereby became an opportunity to examine the extent to which this division of labor is indeed occurring. So where the researcher's theoretical expectations are violated, this does not mean the given theory should be rejected, rather that its relevant constructs should be reworked (Samuels, 2009). In this case, the lifeworld/system-world distinction was still a useful one, but required extending to accommodate the evidence found within this particular organizational setting.

In summary, while the extended case method is not prescriptive, it nonetheless comprises three identifiable stages. This section has outlined those stages and illustrated how they might be implemented in practice. However, the promise of the extended case method—to make connections clear and highlight theoretical novelty—is far from straightforward.

Limitations and Pitfalls

The extended case method harbors at least three hazards for the unwary: first, predetermining what is significant or important; second, overstating the significance of theoretical findings; and third, overestimating the collaborative and dialogic nature of the research process. This section considers each in turn and identifies strategies to avoid or ameliorate their effects.

Pitfall 1: Predetermining What Is Significant or Important

As established above, the fundamental novelty of the extended case method lies in its use of theory: Ethnography is a means to identify anomalies in existing theory, which is then reconstructed in a way that accommodates them. Crucially, the ethnographic case not just is an expression of but is *shaped by* external forces and structures, which is where any anomalies originate. However, Mjøset (2005) asks whether by extending out to the "determining macro context," the extended case method restricts itself to a limited set of research questions. He also queries whether the macro context is actually determining after all.

The Partnership Project illustrated the extent to which the macro context is indeed determining, with participants themselves frequently highlighting the constraining influence of external factors on the organization and its work. For example, during a 5-day meeting at which people from across the organization discussed its forthcoming strategy, one participant describes CU's role in helping people negotiate the interrelationship of local economic activity and global markets:

> For communities, it's an issue of barriers to trade. How can CU help smallholders get over the barriers that they come across, in terms of quality of products and so on, to be able to access markets?

One way in which the Partnership Project avoided predetermining what was significant was by inviting participants themselves to develop and critique our analysis. People across the organization provided input at every stage, from defining the research questions to reviewing the final draft. For example, the recurring metaphor of how "change meets in the middle"—between the bottom-up business and development efforts of partners and communities and the top-down activities of government—was suggested by organizational members.

Second, as discussed at the outset, the extended case method is just one tool for the organizational researcher and should not be seen as offering a definitive answer to every theoretical question that might be relevant to a particular setting. It can and should be used alongside other qualitative methods like interviews, or more quantitative approaches such as surveys. The setting of the Partnership Project has been extensively studied by others (e.g., Disch, Milligan, Mecz, Opazo, & Perez Ochoa, 2008; Williams, 2007). In addition, the pilot project that focused on CU's partnership with one particular corporate partner used a grounded-theory-inspired approach. Consequently, the categories used and the research questions that were carried over into the Partnership Project emerged through a comparatively organic process. The data were not shoehorned into a particular theoretical framework: Rather, during the pilot study, it became apparent that Habermas's theory would offer a potentially useful framework for future analysis.

Pitfall 2: Overstating the Significance and Transferability of Research Findings

The usefulness of a study depends on the sturdiness of the link it makes between theory and practice. If this holds up to scrutiny, then an individual research project can extend beyond its own boundaries, potentially sharpening abstract theories into more precise and useable conceptual tools (Burawoy et al., 2000). This large-scale ambition has been a distinctive hallmark of the method from its earliest incarnations. Clyde Mitchell (1983), a founding member of the Manchester school, suggested the contribution of a given case comes not from the extent to which it is typical or representative but from the validity of its analysis. That is, the anomalies uncovered in the case are used to reconstruct the given theory, which can then be tested in other settings. While not generalization per se, this process nonetheless facilitates a level of comparison between different contexts. As such, the research findings are the basis of any challenge to theory, so their quality is of crucial importance.

The challenges of demonstrating the robustness of an ethnographically based study within a field that can be comparatively hostile to qualitative research are beyond the scope of this article (see, e.g., Cassell, Symon, Buehring, & Johnson, 2006). However, it may be useful to reflect on some of the ways in which the Partnership Project attempted to demonstrate the significance and transferability of its findings. Particular use was made of Golden-Biddle and Locke's (1993) criteria of authenticity, plausibility, and criticality, which they present as more appropriate ways to judge qualitative research than the usual (positivistic) measures of validity, reliability, and objectivity (Lincoln & Guba, 1985). According to these alternative criteria, researchers must convince that they were there and have been faithful to their experience, to connect the experience of the reader with the world being presented in a way that encourages them to reconsider and reframe their own understanding of the themes addressed. The Partnership Project achieved authenticity by presenting diverse examples in a way that reflected the underlying context in which they unfolded, from a meeting with senior businesspeople chaired by Kofi Annan, or the first telephone call between CU and a potential corporate partner, to a roadside conversation between a group of U.K. business and development professionals and a Gambian peanut farmer. Plausibility was pursed by linking these examples to contemporary academic debates that would speak to organizational researchers. So, for example, a conversation between CU and the Nike Foundation was interpreted through a focus on the contrast between business and nonprofit conceptualizations of sustainability. Finally, criticality was sought by challenging the reader's own frame of reference. For example, by drawing on Habermas's framework, the research highlighted how partnership can lead nonprofits to redefine themselves over time, as the relationship becomes integral to the organization's basic identity. This potentially challenges the prevailing stakeholder view of organizations, for example, in suggesting that the ties between organizations are not peripheral but constitutive (see also Wicks, Gilbert, & Freeman, 1994). Through this eclectic approach then, the Partnership Project was able to justify the significance of its findings and make the case for the transferability of its conclusions to other contexts.

Pitfall 3: Overestimating the Collaborative/Dialogic Nature of the Research Process

As underlined throughout, the extended case method relies on a dialogue with participants. This is especially important when working with organizational groups who lack power and status—such as cleaners or call center workers, for example—since practitioners of the method try to avoid reproducing existing power relations. However, the focus on collaboration is relevant to all research participants and settings because participant observation—in any setting—generates its own power effects (Burawoy, 1998). As participants, researchers enter a site invested with hierarchies and resource struggles and are automatically implicated in relations of domination. As observers, the researchers are always there for their own ulterior motives, however noble these may be. However, these effects can at least be reduced. For example, Segall (2001) suggests that involving participants at all stages of the research process—including writing—ensures that their voices can be truly represented. But this represents a real practical challenge for researchers, who must depict their subjects in a way that is intelligible and acceptable to them but also coherent and compelling for an academic audience.

The Partnership Project was self-consciously built on continual dialogue with participants across and beyond the organization in both formal and informal settings. This fit well with the consultative style that characterizes CU, as fieldwork effectively captured hundreds of hours of conversations between dozens of different people as they discussed their approach to working with many different partner organizations. However, a more structured approach was also taken, with participants being asked to give their feedback on the journal article, as well as the doctoral thesis on which it was based. Presentations on CU's approach at academic and business conferences were jointly authored

(e.g., Wadham & Williams, 2010), with other participants invited to comment on the material developed. This collaborative approach was facilitated by CU's position as a self-defined ''learning organization'' (Senge, 1990), in which people often undertake postgraduate and other training, give their time to attract and support academic researchers, and view educational institutions as potential partners. However, even in settings with less interest or experience in academic research, it should still be possible to work alongside participants in shaping the research. For example, while in the Gambia, one of the authors facilitated a workshop for community-based nonprofit organizations. While the purpose of the session was to share knowledge about organizational analysis tools, it was also an opportunity to discuss the nature and practice of collaboration and was a useful source of data to cross-reference with those provided by CU staff. As implied by Golden-Biddle and Locke (1993), similar communicative skills are required whether working with research participants or academic peers. From a positivist perspective, this level of engagement brings the same risk of ''contaminating'' the data that arises in all qualitative research. But the extended case method brings two potential reassurances: first, a commitment to transparency that should make clear when and how the researcher's own biases might come into play; and second, an affinity for mixed methods that allows for a combination of positivist and reflexive methods, with the aim of counteracting the shortcomings of both (Tuttle, 2012).

Discussion and Conclusions

The defining characteristic of the extended case method is that it seeks to extend existing theory. This requires that any theory employed must set out the relationship between constructs and variables in such a way that they can be applied and challenged by participant observation. This requirement—that the theory must be falsifiable and testable—potentially rules out many organizational theories that are neither (see, e.g., Edwards, 2010; Fulmer, 2012). Among those that remain, some will be more apt than others for exploration via the extended case method. Particularly appropriate are macro theories like that adopted in the Partnership Project: Habermas's ideas about the relationship between the lifeworld and the systemworld, the role of dialogue and how it is used by nonprofits and other representatives of the lifeworld, provide a solid framework. At the same time these theoretical ideas have not been widely tested empirically, and the extended case method provided an opportunity to do this. Other possibilities might be the ''grand'' theories of other critical writers such as Adorno, Horkheimer, and Marcuse. So more widely, appropriate theories are those that are falsifiable, are testable, have a macro-level approach to society, but have perhaps not been extensively tested at an empirical level. For example, the growing literature on empowerment could be expanded by using the extended case method to explore the notion of companies as communities of practice, drawing on the work of MacIntyre (1981). Although he claims that all business organizations are focused only on work that produces ''external goods,'' his theory of practice would be useful in exploring the extent to which organizations are also communities of practice that cultivate social and cooperative human activity that makes a contribution to the common good (Warren, 1999). Another contender might be Foucault, whose work sees networks of power, strategies of control, and acts of resistance as fundamentals of the human condition (Warren, 1999). The extended case method could test out the extent to which human resource management, for example, represents yet another system of domination in organizational relationships.

Some theories may be too far along in their evolution to benefit from being used within an extended case study. For example, the notion of transformational leadership, championed by Bass, Jung, Avolio, and Berson (2003) has been extensively tested in empirical studies that have largely supported its central tenets, namely, that effective leaders will exhibit charisma, inspiration, intellectual stimulation, and consideration. In addition, the flexibility of the central pillars of the theory means that it would be hard to identify anomalies, further weakening its suitability for the extended

case method. Another highly respected example, Weick's theory of loose coupling (Orton & Weick, 1990), is not specific enough to throw up the kinds of anomalies pursued by the extended case method. Of course, other theories may simply not be robust enough. An example in the area of leadership might be Fiedler's (1967) contingency model of leadership effectiveness, which distinguishes between relationship-oriented and task-oriented leaders and the contexts in which they are most effective. The theory has already been revised in the light of empirical tests, but remains problematic for its tendency to emphasize formally designated leader to the virtual exclusion of informal leadership processes (Parry & Bryman, 2006).

In summary, the method provides a rigorous yet flexible way to lay bare the social, economic, and political structures within which our daily lives unfold through a vivid portrayal of face-to-face behavior. Where researchers seek to explore the connection between structure and action, and to locate the organizational research setting within its broader context, the extended case method emerges as potentially useful. In contrast to the comparatively structured approach of grounded theory, the extended case method emphasizes research as a creative process that pieces together different stories, perspectives, and knowledge. However, this does not imply a lack of rigor. Rather, researchers must develop an unrivalled understanding of both research setting and relevant theoretical framework(s). This article has focused on how this might be achieved in practice. Potential pitfalls have been identified, along with some ideas about how they might be overcome by a commitment to the method's collaborative principles. In offering a bridge between the micro and macro levels of analysis, the extended case method represents a valuable tool for the organizational researcher, which may help address substantive questions in organizations by developing more rigorous and robust theories.

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