THE COMPREHENSIVE CASE STUDY METHOD: INSIGHTS INTO THE COURSE JOURNEY

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Prepared for The Oklahoma Academy for Innovative Education

Southwest Regional Conference Southeastern Oklahoma State University Durant, Oklahoma--March 27, 1998

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Introduction

Each teacher is faced with the ominous task of reducing large amounts of information for a single course, determining what is to be covered in the time periods of the course as well as for each class session. Perhaps you have already taken on this task for a number of years and feel relatively comfortable; perhaps you are still searching for new ideas and approaches. Nevertheless, each experienced teacher is always striving to adapt materials to create the optimum learning situation for each class.

Just as there is no single best way to shoot a basketball and make every shot, there is no single way to teach each and every class. It is the purpose of this background note to suggest some fundamentals to perhaps assist you in teaching more effectively. By no means would all discussion method teachers consider these suggestions totally adequate or all encompassing--as professors, we all seem to have that inate sense to disagree. But I, as a sample of one at least, have found a number of suggestions raised in this note to be especially useful in my work as a discussion method teacher over the years.

The Course Journey

Every course has a beginning and ending point. At each point, as depicted in Figure 1,

it is possible to address our students' characteristics, knowledge, skills, behaviors, and attitudes. It is also possible to address our own characteristics, behaviors, and attiudes, as instructors, at beginning and ending points as well.

A Course (The Beginning) A Course (The End)

\*------------------------------------------------------------------------------------\*

Time

Beginning Student Characteristics, Behaviors, and Attitudes

Desired Student Behaviors, Performance, and Abilities

Figure 1.

The Course Journey

Beginning and Ending

Imagine the beginning of any course that you teach: What is the range of student motivations during the first week of class? What is the range of their abilities and achievements? What roles do you see students playing in the class sessions during the first part of the term?

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Now, from your viewpoint as the instructor of the course, how would you describe teaching this particular course? How would you describe the learning processes? What do you perceive your roles in the course to be? What are your motivations?

Next, consider what roles you want to play as the instructor during the first part of the term. What types of teaching approaches do you plan to use during the first sessions? How do you plan to assess how well the approaches are working during the first part of the course?

Finally, for both the student and yourself, repeat the exercise for the end of the course. Using the worksheet provided at the end of this note, develop separate lists of responses to the diagnostic questions. If you are working in small groups, allow ten minutes to develop the profiles. Develop the individual responses in writing and then in round-robin style prepare a group listing of the profile sets. The facilitator will record the responses from each group for posting. Please keep in mind the following question as the group continues their work and the facilitator stimulates additional discussion: Who shapes behaviors, teachers or students?

Discussion and Participant-Centered Learning

In medicine, an individual may seek a physician because of some perceived concern about how the body or mind is operating. The physician normally compiles a preliminary problem statement called a case history. The case history is a combination of a patient's response to certain questions about symptoms over time and life circumstances. In addition, other information, both general and problem-related, are collected about the patient's state during the examination. From the sense of case history, the physician attempts to reach a diagnosis, or statement of the problem in terms suggestive of what might have caused it. Further, a treatment is specified, which is some course of action felt likely to remove or at least ameliorate the problem as diagnosed.

Much like the medical model described above, students in a case or discussion course review the information provided and provide opinions, analyses, and conclusions. Thus, students develop skills, abilities, knowledge, and approaches, as well as practice and discipline in becoming more reflective and creative. Most of the major theories of learning developed over the years all point toward effective learning being rooted in experience through the use of

inquiry, discovery, reflection, and critique. Like a consulting physician, students see background information developed for their class use in a different light. They must review the relevant information, analyze it, reach conclusions, and recommend something (the treatment). Also, as in medicine, the most powerful and interesting situations are those which permit a multiple analysis of the same information to lead to several equally viable and powerful analyses, each

with different action implications.

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The discussion leader, as compared to a traditional facilitator, serves as a recorder and organizer of the group's analysis as it emerges in the fragmented form so often characteristic of brief spurts of verbal interactions. The leader can make the product of discussion look as good as the process by organizing and directing its flow through various methods and processes.· A very important part of this organization can come from the instructor's use of visual and summary devices to leave a meaningful record of the group's progress and insight for all those participating.

A good discussion leader also may take a more interventionist role in the class, serving to point up critical conflicts in issues and even playing "the devil's advocate" where no other participant seems inclined to do so. The purposes of challenging individual contributions, whether these challenges come from peers or the discussion leader, are to make the contibutor push his/her thinking to its limits, to successfully cope with challenges, and to force students to grapple with the more subtile issues in the situation.

More intense effort and discipline, from both students and instructors, are required for discussion learning than for any other form of instruction with which I have been associated. Though the instructor may initially feel uncomfortable about his/her ability to control what contributions may be made in the class, the power of discussion learning is great. One is continually amazed at how much students change in a relatively short period of time in terms of energy, analysis, and action.

Roland Christensen (1991, pp. 24-34) refers to the central element of effective discussion leadership as "dual instructional competency". That is, the complex mastery of both content and process. He offers several suggestions for preparation at a fundamental level:

'\*Evaluation of the academic progress of the class as a whole. How well does this group understand basic concepts and application? What still remains and how might the materials be best introduced? What will students' attitudes toward the material probably be and how are they likely to prepare?

'\*Assessment of the class as a learninq qroup. How is the group measuring up to the challenge of the course section? What are their behaviors, attitudes, and moods? What may be happening to them in the wider academic sense to them that could affect future sessions?

'\*Estimation of each student's current set of circumstances. his or her academic strengths and weaknesses as well as abilities to contribute to future sessions. Will the future sessions be of special interest to certain students? Could the material, at this point, offer certain students useful entry points in the discussion based on their backgrounds? Which students might be

good coaches for their peers?

'\*Consideration of the instructor's attitudes, behaviors. and moods. How do I feel about this section of the course? Is this an interesting or fun section to me or will be it a chore? Where might my personal biases and prejudices affect my leadership of future sessions?

'\*Consideration of the mode, pace, and flow of the upcoming sessions. What is an appropriate pace for the materials? Where do I want to probe issues in more depth? In terms of flow, how do I want to construct the issues involved?

\*Development of a rough process plan for upcoming sessions. What choices do I have in helping the group deal effectively with the upcoming materials? How should I divide class discussion between analysis and action? What visual devices can I use at the beginning and ending of class sessions? How active a role do I want to play in the sessions?

\*Determine possible openings and closings for the class sessions. Would it be best to begin with a comment on the previous session and announce expectations for the current session? What type of question pattern should I open with? What type of call pattern would be most effective? How might the group react? How should I end the session?

As Christensen emphasizes (1991, p. 33), there are numerous advantages of considering both content and process:

Systematically previewing both content and the major process dimensions--the group dynamic, student needs and ambitions, instructor's interests and biases, and the interplay among material, discussion mode, and larger course concepts--can help an instructor anticipate, at least in a general sense, the paths a class might want to explore. At the minimum, such planning can prevent a few errors (and terrors) and build the confidence and clearheadedness necessary to seeing and seizing teaching

opportunities when they arise. Most teachers who work through this, or a similar,

protocol several times feel that it sensitizes them to the complexities of discussion teaching. At its best, this preparation can help us harness the learning power generated by the fusion of process and content.

Strategic Course Planning

Selecting a topic area, deciding where to start, how far to go, and how to plan to get there are essential strategic decisions in course planning. Erskine, Leenders, and Mauffette­ Leenders (1981, p. 66) comment that:

These decisions form the essence of course planning. How these decisions are made depends on the subject matter, the time available, the instructor, the students, whether the course is required or optional, old or new, as well as the policies and philosophies of the institution, school or department. Notwithstanding these important and variable conditions, there are at least four common parts to the course planning process:

1) setting the learning objectives, 2) the general course design, 3) detailed planning­ sequencing the sessions and selecting materials, and 4) defining the performance evaluation measures.

Setting performance objectives (Mager, 1962) is basic to initial steps in strategic course planning. Several questions can be raised in regard to the focus of objectives: What is the range of learning goals to select from? What are the starting points to develop objectives?

What are the constraints that must be satisfied? The overarching goal of almost any educational

experience is to end with participants who are different from the beginning. Yet to describe in what ways and to what degree these differences are present can be a difficult task. Bloom (1965) has developed a model of cognitive learning that classifies a broad range of learning outcomes into six major categories:

\*Knowledge: State terms, specific facts, definitions, categories, ways of doing things,.... (No evidence of understanding is required The learner needs only to feed back information given).

\*Comprehension: Change the information to a more meaningful parallel form, paraphase, interpret, infer, imply, extrapolate when instructed. . (Deal with basic knowledge and skills).

\*Application: Apply understandings to solve new problems in new situations... (No directions or methods of solution are specified).

\*Analysis: Identify components, how they are related and arranged... (Draw conclusions through analysis and integration of information).

\*Synthesis: Produce new communication not clearly evident before...(Requires originality or creativity).

\*Evaluation: Formulate criteria and make judgments...(Detect fallacies in logic, evaluate, and decide).

The student or participant is always the key input into the learning process. Numerous authors stress the importance of developing the learning objectives around the student mix anticipated in a course.

Also, certain avenues will be cut-off by time constraints, administrative policies, student level and student mix and other factors that may be beyond the control of the instructor. Nevertheless, several options will remain open and it is up to the instructor to specify the learning priorites and goals. The more effective this activity in course planning is executed, the more valuable it becomes for both instructors and students.

Once learning objectives are established it is possible to continue with the course design. The end product of a general course design is a topic sequence outline by major modules, along with the schedule of class sessions within each module. For example, Figure 2 provides an outline for a senior-level business policy and strategy course.

Course Title: Business Policy and Strategy

Curriculum: Bachelor of Science in Business - Senior Level Requirement

Primary Course Objective: To help prepare an individual for general management responsibilities.

Topic Outline

A The General Management Perspective 5 classes

1. A Concept of "General Management"

2. The Skills of the General Manager

B. What is Strategy? 4 classes

1. Market Opportunity

2. Capabilities

C. Industry and Competitive Analysis 3 classes

1. Noneconomic Factors

2. Profit Potential

3. Strategic Analysis of Industry Structure

4. Relating Opportunities to Capabilities

D. Personal Values and Corporate Strategy 4 classes and Relating Strategy to Social Responsibility

1. Values as Keys to Legitimate Action

2. Awareness of Values

3. The Moral Dimensions of Strategic Action

4. Strategy for Social Action

E. Building Strategy and Organizational 5 classes

Capabilities

1. The Process of Strategic Development

2. Beyond Organization as an Architectural Task

3. Building Organization Capability

F. Transforming an Organization and 5 classes

Building Relationships

1. Ingredients of Successful Planned Change

2. Continual Renewal

3. Building Relationships with Direct Reports, Upward,

and with Customers and Suppliers

4. Building Relationships across the Organization

with Peers

G. Building a General Management Career 4 classes

1. General Management Skills

2. Steps in a General Management Career

Figure 2.

Course Design Major Components

New course design usually starts with an overview of the literature from which the instructor selects the topic areas most relevant for the course. If an instructor wishes to use cases in the course, discussion with practitioners in the field can provide valuable guidance, both to major topic areas and to cases which could be useful. For most instructors, new course

design is something which occurs relatively infrequently. The normal task is one of course redesign. In addition to the positioning of segments within a course, the process of rationalization and sequencing between courses is often an issue in course design or redesign, especially in required courses. For instance, many of the concepts and tools in some courses should be presented before applications and analysis are introduced in subsequent courses.

Detailed planning concerns itself with the sequence of individual sessions and the selection of materials. In discussion-method teaching the instructor must be concerned with how to integrate theory and practice, as this is likely to influence the sequencing decision. One of the enduring academic questions in education over the years has been to what degree to integrate theory and practice. The strategy to remain totally at the theoretical, conceptual, content end of totally at the applications, process, case end has been debated time and time again. However, the debate in many ways is sterile; the question usually is how to integrate, rather than whether

to integrate.

Sequencing and material selection are the twin elements of detailed course planning. Some of the issues involved in sequencing includes understanding versus motivation, easy versus difficult material, and pedagogical logic versus subject matter logic. On the other hand, material selection and sequencing are interdependent decisions. In material selection the emphasis is normally on the selection of cases, even though the existence of many other options is recognized--lecturing, original source reading, text study, library research projects, film viewing, tape listening, generalized discussion, demonstrations, critical incident method, lab work, field work, competitive field work projects, gaming and simulation, programmed instruction, sensitivity training, role-playing, etc.

Not all methods are appropriate for all courses nor should one attempt to include them all in any one course design. However, based on the learning objectives and the major conceptual modules for the course, some combination of the various methods is entirely appropriate and desirable.

Supplemental reading in a course which uses cases needs to be selected and planned with the same care as the cases and other materials. Supplemental reading in connection with case instruction is used principally to provide general background, technical information, or perspective. Direct assignments to books available in the library are common. Optional assignments for additional reading are also frequent. The instructor may announce at the beginning of the course or at the beginning of each section of the course a number of books or articles that may be read. A reading list is sometimes distributed.

A final common element in course planning deals with defining the performance evaluation measures. The most common indicators used in case method teaching include examinations, projects and formal reports, hand-in assignments, class participation and oral presentations. All of these means of measuring performance are not necessarily contained in any one course, nor are they always explicitly labeled.

The course planning process is a difficult one for many. Most instructors would like to be able to accomplish more than they realize they can, so that what not to include is as much a decision as what to include. There are no easy solutions available and the design task appears to be iterative through objectives, general and detailed planning, to material selection and back again. Instructors have been able to develop their own approaches and decision rules for these tasks, many of which appear to have merit. For most instructors, a written document, either a course syllabus and/or a detailed course plan, is the final product of this process.

Class Ingredients

Experienced discussion teachers recognize the importance and necessity of very thorough preparation for every class. Teachers new to the discussion method are sometimes surprised to leam of the extensive time required for class preparation. In addition, initial reactions from students unfamiliar with the discussion method are often that of confusion and frustration and, in many instances, time will need to be provided at the outset of the course for orientation purposes.

Proper preparation, both by instructors and participants, is required to make discussion teaching and leaming effective. In terms of basic minimum requirements, such as becoming thoroughly familiar with the content, and analyzing and making judgments about the information, students and teachers have common preparation tasks. Beyond this level, the respective tasks of students and teachers change. Students in some colleges and universities often may have up to two or three preparations per day, four or five days per week. Individual teachers seldom face such a large number of preparations. However, teachers must go beyond the discussion plan and must prepare strategies for conducting the classes.

Several authors have cited ingredients of a good discussion class-an action

perspective, development of major themes, structural consistency, and effective closure. First, a good discussion class normally asks, "What would you do if you were in this position, circumstance, event, etc.?" This forces students to analyze and evaluate information into one overriding direction--action! We always have the tendency to seek the "armchair quarterback" role, but, under normal conditions, an individual will have neither the time or data to reach a conclusion or decision with complete information. Action planning questions brings numerous perspectives to the forefront and allows for the exploration of emerging frameworks and models from the discussion. Depending on the situation, there are also other types of questions that can be employed. A broad range of question types and functions are shown in Figure 3.

Types of Questions Functions

Open/Closed-End Directive, Imaginative

Information-Seeking Check on Preparation over Materials

Analytical Reasoning/Depth Predictive Forecast Hypothetical "What lfs"

Action Decision-making

Evaluative Critique

Linking Tie Together

Bi-Polar Opposing Views Clarification Reduce Confusion Abstract To Diffuse Experiential Test, Feel, Discover

Figure 3.

Types of Questions and Functions

While we all feel that students can keep up with us and process a great number of themes for each class period, in reality they can only comprehend three to five during a typical class. It is normally good to have prepared various approaches of how the themes are related and anticipate what responses to the themes students might have. The level of detail within each theme is best controlled by the class rather than the instructor. Sometimes it may be important to cover the themes sequentially, at other times the order is less important than dominant points within the themes. In most instances, the instructor will clarify and summarize the transition of one theme to the next. It is not necessary for there to be a clear consensus as the movement occurs between themes; for example, the instructor can take advantage of the situation to highlight the range of arguments before changing topics.

Structure is another important part of any discussion class session. The structure of a discussion session includes the amount of time allotted to each of the major themes. the points at which the transitions should occur, as well as visual and verbal cues that indicate how the themes related to each other. Some of this is possible through transition devices among dominant themes, but, as indicated in Figure 4, it is possible to use verbal and visual cues to direct the structure as well.

Verbal Cues Visual Cues

Voice volume tone speed

Body Language movement location direction

Exclamations

Summaries class instructor periodic closing

Gestures hands arms fingers

Information Giving Posture

Interpretations Facial Expressions

Directive Echo Silence

Board Use

Figure 4.

The Non-Question Process

By capturing some of the themes and the end points of the discussion on the board or flip charts, it is possible to run a very effective class structure. It is less important to know exactly what you will write than what headings you will put on the board and their spatial position. The primary activity of the effective discussion teacher is to listen, not to try to record every single comment made during the session. Only the theme headings and substantive guideposts or connectors (arrows) that enable the building of consensus or alternative viewpoints need to be written and emphasized. The instructor can mentally go through a series of questions to help with this stage of preparation:

-What is my overall teaching plan for the session? What will my board plan probably look like? What will be the major subject blocks or themes?

-What will be the four or five key questions in the planned questioning sequence? Do the questions match the subject blocks?

-What are my planned transitions during the session? What will the transition questions or summaries more than likely be?

Most discussion classes end with some type of summary. The summary normally should not be a rehash of the analysis, but rather should reflect the themes developed in the session. It can also show the various themes are related; stress the major points within the themes; and indicated what type of action could be taken. It is also useful, at the end of the session, to compare and contrast the materials preceding the immediate discussion. The instructor can also change the parameters of the discussion, or pose new contexts, or do "what if' propositions.

This serves to push the validity of the framework or models that the students have been

developing for the course.

It is important to recognize an analysis of information or an action plan that may later tum out not to be a mainstream point. Without this type of contrast it is unlikely that the main point of view can emerge strongly. If an instructor tries to suppress diverse points of view, students will only try to satisfy the instructor's biases rather than address the reality of the situation.

It is critical to involve a cross section of the class. Students who articulate a point of view get committed to it and process subsequent information much more actively than do those who

are more passive. It is also a good tactic to raise questions of clarification, doubts, and

disagreements in class by asking students to comment on others' point of view. In this manner, the class will take responsibility for reconciling different perspectives, or, if that is not possible, for understanding why they are so different. The instructor should intervene only if there appears to be no other avenue, or to stimulate a minority argument, or to provoke deeper thought patterns. In conclusion, a good discussion class can be a powerful learning process and be a rewarding and motivating experience for both teacher and students (Rangan, 1996). It provides avenues for preparing individuals for enhancing their abilities and contributions to organizational environments of the future.

II

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12

**COURSE WORKSHEET**

Beginning Student Characteristics, Abilities, Roles

Beginning Instructor Roles, Approaches, Assessments

1) 1)

2) 2)

3) 3)

4) **4)**

Ending Student Behaviors, Performance, Abilities

Ending Instructor Roles, Approaches, Assessments

1) 1)

2) 2)

3) 3)

4) 4)

Attachment