Teaching Methods for Case Studies

Case method is a powerful student-centered teaching strategy that can impart students with critical thinking, communication, and interpersonal skills.

Having students work through complex, ambiguous, real world problems engages students with the course material, encouraging them to "see it from an action perspective, rather than analyze it from a distance" (Angelo & Boehrer). Case studies are, by their nature, multidisciplinary, and "allow the application of theoretical concepts…bridging the gap between theory and practice" (Davis & Wilcock). Working on cases requires students to research and evaluate multiple sources of data, fostering information literacy.

Case method is also effective at developing real world, professional skills. Working on case studies requires good organizational and time management skills. Case method increases student proficiency with written and oral communication, as well as collaboration and team-work. "Case studies force students into real-life situations," training them in managerial skills such as "holding a meeting, negotiating a contract, giving a presentation, etc" (Daly, 2002).

Getting Started

Setting goals/objectives

Before choosing a case, it's important to set your goals for the lesson. Have a clear set of objectives and "be sure you know what you want to accomplish in the case, what facts, principles, and viewpoints the students should cover" (Herreid, 1998).

Picking a case

"The most powerful and interesting cases are those that allow for several assessments of the same situation, leading to several equally plausible and compelling conclusions, each with different implications for action" (Angelo & Boehrer).

"Cases are narratives, situations, select data samplings, or statements that present unresolved or provocative issues, situations, or questions…The information included must be rich enough to make the situation credible, but not so complete as to close off discussion or exploration. Cases can be short for brief classroom discussions or long and elaborate for semester-long projects" (Indiana University).

"Good case studies focus on one issue or problem, and have a clear problem statement… Choose case studies that match your course objectives, allowing students to apply what they learn in the course to the scenario" (University of Calgary).

Be prepared

"Know all the issues involved in the case, prepare questions and prompts in advance, and anticipate where students might run into problems" (Carnegie Mellon). Within the case "where is the debate? You need to frame the fighting issues, because that's where the action is" (Garvin, 2004).

Get some sense of the timing. A big danger is over packing classes and then shortchanging the material. Break the material into segments, get a sense of how long each debate is likely to last, and determine which issues can be removed or made optional. "You have to be able to flatten or shorten the accordion on segments of class" as needed. Set two or three targets marking when you should be at a certain point in the discussion so you know when to compress and when to fill in the material (Garvin, 2004).

Prepare your students

Students may be unfamiliar with the case method or may be predisposed to distrust group work. They need to know exactly what is expected of them in order to be successful in class. To avoid causing frustration, consider the following tips:

1. Start with a simple case first
2. Discuss the purpose and suggested methods for doing a case assignment
3. If cases are done in a team, introduce students to resources for team dynamics
4. Allow sufficient class time for students to meet with their teams
5. Establish discussion etiquette guidelines
6. Take sufficient time to introduce the narrative and establish the case facts
7. Reassure students that "messiness" is normal for this type of assignment
8. Make sure you give students an opportunity to provide their reactions and feedback (Pyatt, 2006)

If there are specialized skills or knowledge needed to complete the case analysis, go over this with the class. "Provide background resources for the case study, including supplementary readings and the necessary data to form an opinion" (University of Calgary). Spend some time at the beginning familiarizing students with specialized terminology or the expected formats for professional documents (Daly, 2002).

Get to know your students

For case method to be successful, you must be familiar with your students. "Link the material with the people who are there. Who's been an entrepreneur? Who's worked in a large technology company?" Have students fill out cards listing their educational backgrounds, work histories, and interests. Review these cards before each class and make a list of four or five students in each class who are most likely to contribute something to the discussion (Garvin, 2004).

It's also important for students to get to know and trust one another. If students don't consider the classroom a safe space, they won't contribute to the discussion. Help them get acquainted with name tags or cards for their desks (Herreid, 2001). A positive atmosphere can be created by setting out ground rules for participation. "Emphasize that the analysis will be a group project, and that no one will be criticized for raising naïve questions or uncertainties… and that everyone is required to actively work together on the analysis… Without a clear sense that they are free to experiment with hypotheses, students will tend to remain silent until they feel that the 'right' answer has been identified" (Stanford University).

Discussions

In his analysis of case discussion, C. Roland Christensen argues that student involvement develops on at least three distinct levels:

> "At the first level, students explore a problem by sorting out relevant facts, developing logical conclusions, and presenting them to fellow students and the instructor. The students discuss someone else's problem; their role is that of the commentator-observer in a traditional academic sense. On the second level, students can be assigned roles in the case, and take on perspectives that require them to argue for specific actions from a character's point of view, given their interests and knowledge. Finally, on the third level, students will take the initiative to become fully involved, so that topics are no longer treated as abstract ideas, but become central to the student's sense of self—of what they would choose to do in a specific real world situation." (Stanford University)

Leading the discussion

A basic framework for a case-based discussion can be broken down into six steps:

1. *Give students ample time to read and think about the case*. If the case is long, assign it as homework with a set of questions for students to consider.
2. *Introduce the case briefly and provide some guidelines for how to approach it*. Clarify how you want students to think about the case. Break down the steps you want students to take in analyzing the case. If you would like students to disregard or focus on certain information, specify that as well.
3. *Create groups and monitor them to make sure everyone is involved*. Small groups can drift off track if you do not provide structure. You may want to designate roles within each group. Alternatively, group members could be assigned broad perspectives to represent, or asked to speak for the various stake-holders in the case study.
4. *Have groups present their solutions/reasoning*
5. *Ask questions for clarification* and to move the discussion to another level
6. *Synthesize issues raised*

(Carnegie Mellon)

Classroom setup

If it's possible to change the seating arrangement in your classroom, "a horseshoe-shaped seating arrangement works best. The open part of the U should face the blackboard… This arrangement permits all of the students to see one another… You don't always have to be in the center of the horseshoe. You can move out of the U altogether" when the students are talking to each other (Herreid, 2001).

Use the blackboard to bring the discussion together. Writing comments on the board is a way to engage students, showing them that they've been heard. Drawing circles, arrows, and underlines to connect these comments is a way to link fragments of discussion into a summary of what's been said (Garvin, 2004).

Asking questions

The first question is important for setting the right tone for the rest of the discussion. Start with an open-ended inquiry. "If you start with a question that is too obtuse, too formidable, or looks like a trick question, no one will answer… The best opening questions are open ended, where there are multiple reasonable answers, or where the question is neutral and simple to answer." Hold back from engaging with controversial or emotional material until all the facts have been established and put into context. If you start off on a fighting issue, "there is a good change that the facts will get lost in the barrage of attacks and counterattacks that ensue" (Herreid, 2001).

As the discussion gets going, it's important to listen and plan follow up questions carefully. Professor David Garvin suggests listening at four levels:

> "I listen for content. I listen for what is said, and how it tracks with the analysis we need to get done. The second thing I listen for is how things are said. There are always emotional undercurrents. Sometimes the voice is tentative. Sometimes the voice is very strong. Sometimes there's a lack of energy in the comments. Sometimes there's tremendous dynamism in the debate. So I'm listening for that particularly so that, when we hit an emotional current, we can ride it. That's where the class tends to take off.
>
> The third thing I'm listening for is almost a contradiction in terms. I'm listening for what is left unsaid. Take, for instance, a case which has ethical implications. Students are often very uncomfortable raising the ethical issues. If I go for ten, fifteen, twenty minutes in the heart of a discussion, and people are avoiding that point, I'll raise it.
>
> And then the fourth thing you listen for, and this one is tricky, is you listen for disconnects. When somebody says *X*, and somebody comes back with a response that doesn't quite meet them, there is a lack of correspondence somehow. They either didn't get it or they didn't quite take it in and fully understand it. In order to engage the debate they have to be on the same wavelength" (Garvin, 2004).

The kinds of questions you ask will control the kind of debate that follows. Potential techniques include:

1. *Delay the problem-solving part* until the rest of the discussion has had time to develop. Start with expository questions to clarify the facts, then move to analysis, and finally to evaluation, judgment, and recommendations.
2. *Shift points of view*: "Now that we've seen it from W's standpoint, what's happening here from Y's standpoint? What evidence would support Y's position? What are the dynamics between the two positions?"
3. *Shift levels of abstraction*: if the answer to the question above is "It's just a bad situation for her," quotations help: When Y says "_____," what are her assumptions? Or seek more concrete explanations: Why does she hold this point of view?"
4. *Ask for benefits/disadvantages of a position*; for all sides.
5. *Shift time frame*—not just to "What's next?" but also to "How could this situation have been different?" What could have been done earlier to head off this conflict and turn it into a productive conversation? Is

it too late to fix this? What are possible leverage points for a more productive discussion? What good can come of the existing situation?

6. *Shift to another context*: We see how a person who thinks X would see the situation. How would a person who thinks Y see it? We see what happened in the Johannesburg news, how could this be handled in [your town/province]? How might [insert person, organization] address this problem?
7. *Follow-up questions*: "What do you mean by ___?" Or, "Could you clarify what you said about ___?" (even if it was a pretty clear statement—this gives students time for thinking, developing different views, and exploration in more depth). Or "How would you square that observation with what [name of person] pointed out?"
8. *Point out and acknowledge differences in discussion*—"that's an interesting difference from what Sam just said, Sarah. Let's look at where the differences lie." (let sides clarify their points before moving on). (Indiana University)

Transitions

Moving the class seamlessly from one section of the discussion to the next can be a challenge. By developing a system of clear signals and using them consistently, the students will learn to follow your lead. One way of signaling a transition is to change blackboards when you want to move to a new topic. Use the physical space of the classroom, standing to the side when leading a discussion between students and then coming to the center of the room when it's time to bring the attention back to you. Finally, summarize the important points at the end of each segment, this will both help change the topic to the next section as well as help make it easier to bring everything together at the end of class (Garvin, 2004).

Classroom Activities

Beyond discussion and small group work, there are a number of techniques that can be used to enhance case method.

1. *Role-play*
   When picking students for role-play, try to consider their backgrounds and pick students who either fully identify with the role or are on the exact opposite end of the spectrum. Pick students who have participated before, as they will be likely to enliven the discussion. Finally, pick students across the room from each other so that their dialogue will bring the students sitting in between into it, rather than shutting them out (Garvin, 2004).
2. *Take a vote*
   A vote requires students to publically commit to their positions, engaging them with the discussion and making them more likely to argue for their side. It will also give you a sense of where the class stands on the debate. If the vast majority of the class stands on one side, you'll know to back up the minority so they don't feel overwhelmed and stop participating, shutting down the debate (Garvin, 2004).
3. *Have students write their own case studies*
   "In order to construct a plausible case study, they will research facts, consider various angles of an issue, and have greater engagement in the course" (University of Calgary).
4. *Divide the case into parts*
   Break the students into groups and assign each group a different aspect of the study. Have them present their findings to the other groups. "Remind students that they do not have all the information they need to solve the case but based on the information available, they can make recommendations and come to

preliminary decisions," something they will have to be able to do in real life business situations (Daly, 2002).

5. *Message boards*
   Have the students continue the discussion on a message board within Blackboard, on a class blog, or using Twitter. This will give them room to reflect on their positions, and allow you to track their discussions over time (Pyatt, 2006).

Evaluation

Each time you include a new case in a course, it's important to assess what the students have learned, and if there are ways to make it better. If you're new to teaching case studies or if you want to switch up your method, only try one or two new techniques at a time, then evaluate again (Garvin, 2004).

It can be difficult to see the success or failures of case method right away, but there are some ways to track if a particular case is having positive outcomes. During the course, judge if the students are making substantive headway into the material without having to be led by the hand. Are they engaged with the issues and enthusiastic about the discussion? In subsequent classes, assignments, and exams, are they applying what they learned in the original discussion? (Garvin, 2004).

Having students complete assignments based on the case study will not only engage them with the material, but will help you determine their progress. Potential assignments include a summary of the issues, a position paper, a concept map, a reflection paper, or a research paper exploring further aspects of the case (University of Calgary).

Based on student responses, you can judge if the case needs to be "developed further, or whether more background information can or should be provided" in the future (Stanford University).

Work Cited

Angelo, T & Boehrer, J. (2002). Case learning: How does it work? Why is it effective? *Case Method Website: How to Teach with Cases, University of California, Santa Barbara*. http://www.soc.ucsb.edu/projects/casemethod/teaching.html

Case studies: Connecting theory to practice. *Teaching Strategies Series, Teaching and Learning Centre, University of Calgary*. http://tlc.ucalgary.ca/resources/library/itbl/connecting-theory-to-practice/connecting-theory-to-practice.pdf

Case studies. *Design & Teach a Course, Carnegie Mellon*. http://www.Carnegie Mellon/teaching/designteach/teach/instructionalstrategies/casestudies.html

Daly, P. (2002). Methodology for using case studies in the business English language classroom. *Internet TESL Journal*. 8(11). http://Daly, 2002/Techniques/Daly-CaseStudies/

Davis, C. & Wilcock, E. Teaching materials using case studies. *UK Centre for Materials Education, Higher Education Academy.* http://www.materials.ac.uk/guides/casestudies.asp

Garvin, D. (2004). Participant-centered learning and the case method: A Case study teacher in action. *Harvard Business School*. http://Garvin, 2004/multimedia/pcl/pcl_1/start.html

Herreid, C.F. (1998). Return to Mars: How not to teach a case study. *Journal of College Science Teaching*. May 1998. http://sciencecases.lib.buffalo.edu/cs/pdfs/Return%20to%20Mars.pdf

Herreid, C.F. (2001). Don't! What not to do in teaching cases. *Journal of College Science Teaching*. 30(5), 292-294. http://sciencecases.lib.buffalo.edu/cs/pdfs/Dont-XXX-5.pdf

Pyatt, E.J. (2006). Using Cases in Teaching. *Teaching and Learning with Technology, Penn State University*. http://tlt.its.psu.edu/suggestions/cases/

Teaching with case studies. (1994). *Speaking of Teaching, Stanford University Newsletter on Teaching.* 5(2). http://www.Stanford University/dept/CTL/cgi-bin/docs/newsletter/case_studies.pdf

Teaching with the case method. *Indiana University Teaching Handbook.* http://www.teaching.iub.edu/wrapper_big.php?section_id=case