

LEARNING FROM THE CASE METHOD

A REPORT TO THE EUROPEAN CASE CLEARING HOUSE

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Executive Summary

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Background

The Case Teaching Method in management education and development is the most used approach outside the traditional lecture/instruction format. For many management teachers and developers it is much more than just another methodological option in a range of approaches, it is central to defining their educational and development practice. Case study teaching is central to a global 'community of practice' in management education and development. It is supported by extensive structures and institutions. It defines the teaching/learning approaches of whole courses, programmes and institutions.

The great majority of the extensive discussion, in the case community, of how the Case Method works is pragmatic and a-theoretical. Central to the Case Method is a scepticism about basing management and organisational practice on any straightforward application of theoretical generalisations – this proposition is central to the foundation of the Case Method and its orientation to learning (the issue of whether theory has no role in relation to management practice, or a more complex one of offering different interpretative frameworks, is more contested). It is clear that case teachers and developers bring this attitude to the role of theory in relation to the practice of management back to their attitude to their own practice as facilitators of learning. While this is understandable there is no logical reason why this should justify an a-theoretical approach to understanding the process of the case study. This report and study promotes the argument for an approach to understanding and improving the use of the Case Teaching Method based on a use of relevant theories, models and good practice.

Historically teaching methods, perhaps like practices in other field of endeavour, have progressed from the pragmatic to the more theoretically, empirically, scientifically informed (think, for example, of medicine with pragmatically discovered herbal remedies being followed by scientifically 'designed' treatments, with the former still occupying a strong place in the range of contemporary practices).

Lecturing / instruction presumably has its historical origins in the ecclesiastical practices of sermons and readings, and indeed can be seen as the secular version of these as educational institutions have evolved out of monastic ones. More recent teaching methods: role-playing, simulations, business gaming, various experiential methodologies have been designed, at least partially on theoretical, empirical, scientific grounds. On this spectrum the Case Method occupies the middle ground. It was the first method to offer a serious alternative to the traditional lecture/instruction session, but it predated the more theoretically based approaches to which it opened the door.

This study concludes that there is considerable potential for developing the application and output of this robust, popular and enduring teaching approach.

This report shows some of the ways in which a more theoretical approach to thinking about the learning process in the Case Method allows a more integrated understanding of the issues behind the mass of ideas about good practice, and strengths and weaknesses of the Case Method. Particular issues are the contested extent to which the Case Method brings reality and the ability to practice action to the learner. The theoretical analysis also highlights the very limited extent to which the practice and rationale of the Case Teaching Method acknowledges, understands and responds to the differences between learners in term of their learning processes and styles, the personal strategies in which these area embedded, and the varying personal contexts in which these exist. There is a great tendency for the Case Method to homogenise the learner.

What Does the Literature Tell Us?

Our literature review reveals that:

The Case Method seems not to be attached to any existing learning theory.

Ninety years of practice have not led to the development of a new learning theory or sub theory explaining why the Case Method works.

The assumption is that 90 years of experience proves that the Case Method does work.

While theory is absent, nor is there any model describing how and why the process works in learning terms.

Different responses to the Case Method which might relate to national culture, gender or organisation culture are not indicated as significant themes in the literature.

Those attempts which have been made to describe the learning process involved in the Case Method have remained at a level of relative superficiality. ‘Active learning’, ‘Participative process.’ More is known about what is actually involved within these generalisations than case tutors have themselves written about.

Learners are apparently viewed as a generalised mass with occasional aberrations of conduct. There are practically no references to the significance or extent of preferences by individuals of how they learn.

Perhaps because of the absence of a sustained theoretical discourse amongst Case Method practitioners and advocates there is considerable, and partly obscured, differences, in beliefs and practices associated with the Method. This extends to diametrically opposed views on some practices, and on what count as strengths or weaknesses of the method. There also remains considerable latent disagreement, both in general terms and in specific application situation, as to what the learning/educational goals are for the Case Method.

Our small scale study of three case teaching events including examining the experience with the participants suggest that while most participants appreciate the method and get something out of it this is highly variable in its nature and process. Student orientations cover a spectrum from active to passive. Active students use a variety of learning strategies and styles, often formed in response to tutors explanation of the method. For the 'active' students getting into a collaborative or competitive relation with other students is an issue. Passive students just evaluate it as an experience – like a TV programme or play, finding it interesting/not-interesting etc.. Where formal assessment for a qualification is involved personal strategies for dealing with this is a very significant part of learners' personal agendas, and appears to take precedence over any sense of preparing for the practice of management.

How Learning Might be Improved

In encouraging case teachers to think more theoretically, both individually and collectively, about their practice, we suggest that the six most important issues that need addressing to improve practice are:

- Understanding and using the full range of opportunities within the learning cycle.
- Relating to the variety of learning styles and underlying strategies, as they affect how learners use the learning cycle, and how this is facilitated and inhibited by what goes on in class.
- Considering how case teaching strategy can be relate to learners' espoused theories – what they understand and can say, to their theory-in-use - what underlies what they can do in a work situation, and the linkage between single (improving means) loop learning and double (challenging and revising ends) loop learning.
- Developing a strategy for dealing with the development and improvement of tacit knowledge – and dealing with the issue of whether it should be made explicit or 'improved' in its tacit state.
- Using the experience with a case to improve learning to learn.
- In dealing with these issues case teachers should consider the objectives of their teaching, learning approaches, methods, models ideas and situational awareness along side developing the ability to learn itself and adapt to future situations. Our study suggests that Case Teachers can take a 'both / and' approach to this choice, and hence get 'double value' from their sessions.

The report offers a number of detailed ideas for how case teachers, both individually and collectively, and through using their case teaching as a kind of practical theory led action research on learning, might do this. These cover diagnostic steps that can be taken prior to design and planning, the design of programmes using the Case Method, particular case sessions, procedural issues for conducting case sessions, dealing with the dynamics of human interaction in the class, and learning related practices that students/learners might be encouraged to adopt.

This study has gone into some depth on both the literature and the practitioner views of the purpose and process of the Case Method, and the criticisms of it. It has cross-related these to a modestly scaled study of three case teaching episodes in undergraduate, postgraduate and post experience contexts, including a review of the experience with the participants. This has provided reinforcing evidence for a number of our conclusions, particularly those about variety in learning style and strategy from the learners' points of view.

Further Research

Against this background it is suggested that further research should reverse the emphasis – focus primarily on the students/learners against a background of propositions and hypothesis derived from out increased understanding of the theory and practice of the Case Method, and the educational beliefs and practices of those who use it.