TEACHING & THE CASE STUDY METHOD

CASE STUDY METHOD
by William M. Timpson & Debra K. Holman

INTRODUCTION

Complexity is reality—in the world, in our relationships, in our classrooms—yet so much of our work as educators is focused on simplifying, reducing, and getting to the core concepts that are more easily transmitted. This tension is so much more pronounced when the topic is sustainability, an inherently interdisciplinary, even transdisciplinary, concept. Ecology, for example, is the study of the relationships between living organisms and their interactions with their natural or developed environment and, as such, requires holistic thinking and systems analyses.

Traditional approaches to instruction often suffer from the pressure of reductionism, the analysis of something into simpler parts in order to explain it. We set goals and then objectives. We lecture. We identify underlying concepts and build down tree diagrams that explain the specifics. In this manuscript, instead, we embrace complexity in all its messy reality—the conflicting claims, the debates and disagreements, the ambiguity—for two reasons. First, we want to address inherently complex material for what it is and not fall prey to the academic's pull toward oversimplification. Second, we also want to embrace inherently complex material for its rich opportunities to develop critical and creative thinking.

William Perry's (1981, 1999) work on cognitive development during the college years serves as a useful framework for understanding and guiding our work with case studies. Perry notes that students typically arrive at college thinking in very dichotomous ways, i.e., ideas are right or wrong, that reality is a matter of black and white. Their previous school experiences served to embed the notion that there is one right answer. The multiple choice testing they underwent at the gateway to college only reinforced this notion. When these students begin to hear divergent opinions in college, when they begin to see the complexity in the issues they study, they open up to the "greyness" in life, what Perry termed the multiplicity of perspectives that they learn to see as possible. Along the way, these students are pushed to rethink their positions, to deepen their own understanding, exploring new possibilities and casting off or modifying some inherited beliefs.

To achieve this broader perspective and sort through a range of responses also requires some skill at taking that step back, reflecting and analyzing—what psychologists refer to as meta-cognition, or thinking about thinking. In Metateaching and the Instructional Map, Timpson (1999, 87) describes it this way: "Problem-based learning (or case-based learning) is an approach to instruction that is gaining increasing popularity in some parts of higher education, especially in fields like medicine, where students will eventually move into roles calling for a great deal of critical and creative thinking about real and inevitably complex problems."

Barrows and Tamblyn (1980) note how professional roles typically defy overly reductionistic reasoning. The instructor's role is to guide students through their exploration of the central issues,

explaining how to access the various sources that are available. In essence, learning is about an immersion in an issue and a process for exploration.

Case Studies

Based on their work at the Harvard Business School, where the case study method has been practiced and refined over many years, Barnes, Christensen, and Hansen (1994) have laid out compelling reasons for this approach to instruction and learning. Offering a tangible expression for Bloom's (1956) hierarchy in the cognitive domain, case studies offer students opportunities to apply their knowledge with real world examples, to deepen their understanding through analysis, synthesis, and evaluation. Students are challenged to discover their own responses, but then check their ideas against what others in class are thinking, as well as what ideas are in various published sources. With complex cases, they often also discover a range of opinions and their challenge is also one of evaluating those sources and the lines of reasoning each represents. Here we can also see the expression of Kuhn's (1970) classic work on paradigms, how ideas are embedded in certain prevailing lines of reasoning.

Working with case studies is also quite stimulating, for students and instructors alike. The challenges can be very invigorating, exactly what various developmentalists have long championed. Kohlberg (1963), for example, asked instructors to develop dilemmas that would engage students in deep discussions around moral choices. This kind of intellectual and emotional investment in issues could, he argued, serve as catalysts for moral development. Piaget (1970) used various categorization tasks to assess progress along a continuum of logical reasoning and long argued for teachers to create rich and stimulating environments for students. In the evaluations of problem-based learning, while students performance on standardized exams may not be superior to direct instruction, it is very clear that students deeply appreciate the benefits of engagement, discovery, and relevance that are associated with problem- and case-based learning (Hmelo-Silver 2004).

Discovery and Drama

Timpson and Burgoyne (2002) draw parallels between the world of performing and what an effective case study can accomplish. For one, conflict and transformation, the hallmarks of every good drama, are deliberately at the heart of an effective case study. It is important to care about the issues under study, to see the various positions as credible and defensible. Unlike the theater, however, case studies typically do not resolve easily. There are multiple interpretations and multiple endings that are possible. However, effective case studies are very much like great theater in the complexities each addresses through engaging activities, both intellectually and emotionally. There is something exhilarating for students and instructors alike when important issues challenge easy solutions.

Timpson and Burgoyne write: "Using case- and problem-based learning can give you many opportunities to mix discovery and drama. Case studies have been popular in business and law schools for years. Several medical schools have adopted problems as a central organizing focus for their curricula and classroom instruction. One major benefit is the closer connection between what happens in class and what is demanded in the field. The drama of the 'real world' can help you better engage and energize your students" (2002, 218).

Communication and Classrooms

Case-based learning does not just happen. To serve as effective guides, instructors must be skilled with a range of communication models. There will be times when direct instruction is ap-

propriate, when material must be presented in clear terms. However, rather quickly, cases will plunge students into the heart of a compelling issue with all its varied arguments, subtleties, and contradictions. Here is when deep listening and empathy are important. Value differences can also surface and require some awareness to navigate. Having a model for consensus and a process for resolving issues that arise in groups without devolving to either aggressive or submissive responses can also be important. Knowing how to ascribe the roles of Transactional Analysis—the Parent, Adult, and Child ego states—offers students of all ages an accessible and effective framework for analyzing past interactions and planning for the future. Finally, knowing how to impose a behavioral analysis on actions taken can also prove useful for resolving questions and concerns.

Diversity, Sustainability, Peace and Reconciliation

Among the topics that are inherently complex and that require interdisciplinary or transdisciplinary thinking, three areas, in particular, seem ideal for case study development. Teaching about diversity often raises emotionally charged issues. Discussions about racism, sexism, homophobia, religious differences, and "political correctness" can touch nerves, intimidate the meek, shut down honest exchange, provoke defensiveness, and more. Sustainability, in turn, raises all those big issues of global warming and human complicity, our "ecological footprints" and the standard of living we have become used to, the "carrying capacity" of the earth and the demands of a growing population worldwide. Peace and reconciliation, then, represent all those skills, values, and beliefs that allow us to handle our differences, our disagreements, and conflicts without resorting to violence.

What's common to each of these areas is the holistic thinking, the systems thinking, that helps to connect complex issues within a web that we can push ourselves to understand. What's common to each is the critical and creative thinking needed to handle ambiguous information from varied sources. What's common to each is the cooperation needed to mobilize collective action in constructive directions. These are all skills and understandings that practice with case studies can nurture.

REFERENCES

Barnes, Louis, C. Roland Christensen, and Abby Hansen, 1994. *Teaching and the case study method*. Boston, MA: Harvard University Press.

Barrows, Howard, and Robyn Tamblyn. 1980. Problem-based learning: An approach to medical education. New York, NY: Springer Publishing.

Bloom, Benjamin, ed. 1956. *Taxonomy of educational objectives: Handbook I, Cognitive domain.* New York, NY: Longman Green.

Hmelo-Silver, Cindy. 2004. Problem-based learning: What and how do students learn? *Educational Psychology Review* 16(3), 235-266.

Kohlberg, Lawrence. 1963. The development of children's orientation toward moral order: Sequence in the development of moral thought. *Vita Humana* 6:11-33.

Kuhn, Thomas. 1970. *The structure of scientific revolutions.* Chicago, IL: University of Chicago Press.

Perry, William. 1981. Cognitive and ethical growth: The making of meaning. In *The modern American college*, edited by Arthur W. Chickering. San Francisco, CA: Jossey-Bass.

Perry, William. 1999. *Forms of intellectual and ethical development in the college years.* San Francisco, CA: Jossey-Bass.

Piaget, Jean. 1970. *The science of education and the psychology of the child.* New York, NY: Orion.

Timpson, William. 1999. *Metateaching and the instructional map.* Madison, WI: Atwood Publishing.

Timpson, William, and Suzanne Burgoyne. 2002. *Teaching and performing: Ideas for energizing your classes*. 2nd ed. Madison, WI: Atwood Publishing.