
The **ABCs** of
Case Teaching

Pew Case Studies in
International
Affairs

Vicki L. Golich

Professor, Political Science and
Director, Faculty Center
California State University San Marcos

Mark Boyer

Professor, Political Science
University of Connecticut, Storrs

Patrice Franko

Associate Professor, Economics
Colby College

Steve Lamy

Deputy Director and Associate Professor
School of International Relations
University of Southern California

INSTITUTE FOR THE STUDY OF DIPLOMACY
Edmund A. Walsh School of Foreign Service
Georgetown University

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For additional information on Pew Case Studies or
The ABCs of Case Teaching, contact:

Patricia Rayner
Manager of Publications
202-965-5735 x3005
E-mail: raynerp1@gunet.georgetown.edu
URL: www.guisd.org

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Preface

Writing a manual on case teaching is more than a bit intimidating. Like all excellent teaching, it is an art, not a science; good case teaching comes from the heart, created by the mix of the teacher's personality, knowledge expertise, and students.¹ No *one* path leads to good case teaching. So writing a how-to book seems an act of hubris.

It is probably best to think of what follows as a set of guidelines to “adapt not adopt” to your own personal teaching style and level of comfort. You will likely disagree with pieces of what we offer. There are as many variants of case teaching as there are case teachers.

To avoid presenting case teaching as “the world according to us,” we have gathered, borrowed, and shamelessly stolen idea ² on case teaching from our case teaching colleagues, whom we met through The Pew Faculty Fellowship in International Affairs. From 1990 through 1994, five groups of 24 Fellows had the privilege of participating in an intensive two-week case teaching workshop at the Kennedy School of Government sponsored by the Pew Charitable Trusts. Under the inspiring leadership of John Boehrer—and with the able and untiring assistance of Debby Green—each class transformed its teaching. We learned the fundamentals of case teaching by doing. To capture the essentials of this experience on paper is an exercise in humility. Yet we want to share what we learned—and what we are continuing to learn in our case classes—with interested colleagues. We owe a particularly heavy debt to major contributors Maryann Cusimano (Catholic University) and Pat Tower (United States Air Force Academy). We are also indebted to Laura Moore, Colby Class of '95, who, in addition to being a terrific case student, was instrumental in packaging an earlier version of these materials.

And so it is to the new case teachers-to-be, to our colleagues in Pew, and, most of all, to John Boehrer and Debby Green, who made it all possible, that we dedicate this teaching manual.

1. Parker Palmer, *The Courage to Teach* (San Francisco, CA: Jossey-Bass, 1998).

2. David A. Garvin, “Building a Learning Organization,” *Harvard Business Review*, Vol. 71, No. 4, (July 1993), pp. 78– .

The ABCs of Case Teaching

What Is a Case?

A case is a story. Cases recount—as objectively and meticulously as possible—real (or realistic) events or problems so that students experience the complexities, ambiguities, and uncertainties confronted by the original participants in the case (be they foreign policy decisionmakers, medical doctors, or government officials). As they “inhabit” a case, students must tease out key components from the real messiness of contradictory and complicated information. Cases compel students to

- distinguish pertinent from peripheral information,
- identify the problem(s) at hand and define its context and parameters,
- identify a set of possible solutions,
- formulate strategies and recommendations for action,
- make decisions, and
- confront obstacles to implementation.

A **retrospective** or **narrative** case presents a comprehensive history of a problem—complete with multiple actors, contending interests, and the *real* outcome; students identify alternative options and analyze why this outcome resulted, when other—possibly “better” solutions—existed. A **decision-forcing** case stops short of revealing the outcome, thus forcing students to identify and assess the range of possible options for action. Typically, these cases have an “Epilogue,” which tells “the rest of the story”; again, students analyze why this was what happened.

Case formats vary. They can be formal written cases, a lead newspaper article, a movie clip, a radio/TV news story, a picture, a mathematical word problem, a piece of art. Whatever the format, cases

- illustrate issues and factors typical of the kind of problem under examination,
- reflect theoretical frameworks,
- underscore prevailing disciplinary assumptions and principles, and
- reveal realistic complexities and tensions.

A case for teaching differs from a research case, which intentionally seeks to reveal, demonstrate, or refine disciplinary theory. The latter includes substantial analysis; the former “just tells the story: what happened, who was involved, what they contended with, and, sometimes, how it came out.”¹

1. John Boehrer, “How to Teach a Case,” The Public Service Curriculum Exchange #N18-95-1285.0 (Seattle WA: University of Washington, 1995/6), p. 2.

The ABCs of Case Teaching

What is Case Teaching?

A case teacher resembles an orchestra conductor. Much as a conductor creates music by coordinating individual performances, providing key signals, and knowing what the outcome should sound like, a case teacher generates learning by eliciting individual observations and analyses, asking key questions, and knowing what learning outcomes s/he wants students to achieve. And, just as the conductor cannot make orchestral music alone, the case teacher does not generate learning alone; each depends on individual as well as collective performances to achieve stated goals.

One case teacher compared case teaching to attempting to assemble a group of parachutists at a single location after they had all landed at geographically diverse locations.¹ Initially, individual students are likely to notice different ideas or details in a case. One of your tasks as a teacher is to orchestrate students' observations so that they eventually come to comprehend the larger goals for the day.

Case teaching grounds academic instruction in reality by engaging students in discussion of specific situations. Case teaching is learner-centered, characterized by intense interaction between instructor and student, as well as among students in a group. Conceptually, case teaching assumes that learning is more effective if students discover or construct knowledge with faculty guidance, than if they sit passively and receive content from a distant "sage on the stage."² Just as a child learns to ride a bike by getting on it, students in a case-based course actively engage course material. They simultaneously learn curricular content—knowledge—and *how* to learn—skills and competencies such as writing, speaking, listening, and critical thinking. The student lens for a case is the very complicated vantage point of the policymaker—not the clean, analyzed pages of the textbook.

Case learning depends on inductive reasoning, making content the very foundation of a case course. Case learning sharpens communication and critical thinking skills as students

1. Boehrer and Marty Linsky, "Teaching with Cases: Learning to Question," in M.D. Svinicki (ed.), *The Changing Face of College Teaching, New Directions for Teaching and Learning*, no. 42 (San Francisco, CA: Jossey-Bass, 1990).

2. Boehrer, "On Teaching a Case," *International Studies Notes* Vol. 19, No. 2 (1994a), pp. 14–20; Boehrer, "Spectators & Gladiators: Reconnecting the Students with the Problem," *Teaching Excellence—Toward the Best in the Academy*, Vol. 2, No. 7 (1990–1991); D.A. Kolb, *Experiential Learning: Experience as the Source of Learning and Development* (Englewood Cliffs, NJ: Prentice Hall, 1984); Jane Tompkins, "Teaching Like It Matters: A Modest Proposal for Revolutionizing the Classroom," *Lingua Franca* (August 1991), pp. 24–27.

apply knowledge and evaluate options to solve the problem at hand. Case discussions teach students to listen carefully to each other, to respect opinions of others, and to work collectively to solve a problem. Thus, students learn to value the contributions of others while strengthening their own ability to think creatively and communicate effectively.

How Does Case Teaching Differ from Traditional Teaching?

First, it may be important to specify how case teaching and traditional—lecture—teaching are alike. The objectives are largely the same. No matter what pedagogy is used to deliver an education, most faculty want their students to learn significant disciplinary content, to refine their critical thinking and communication skills, and to gain in self-confidence and social awareness. The differences between case- and traditional-teaching derive from the underlying assumptions about *how* to achieve these goals most effectively.

Traditional teaching depends upon the teacher transmitting the data in a clear and interesting manner. In a lecture class the professor is center stage, does most of the talking, and provides most of the information and analysis. Students become stenographers, trying to do down as rapidly as they can the font of data and interpretation flowing from the expert. At best, students make cameo appearances to react to what the professor says. With case teaching, students occupy center stage, and your role is as a “guide on the side”—a production choreographer. Students are likely to construct a less linear highway to the day’s planned learning outcomes, thus, you will benefit from practicing different planning strategies than you have when preparing a lecture.

Much like writing a manuscript for publication, developing a lecture involves choices about the quantity and scope of information and analysis *you* will present. Notes for a case class look more like a road map or a decision-making tree. Preparation shifts from making decisions about articulating a perspective, to detailing a question strategy that enables students to discover for themselves the content, arguments, and theories implicit in the case.

Case classes differ from traditional classroom experiences in the material used and the activity during the class setting. Case teaching places the student at the center of the educational process. Students matter. They are given significant responsibility for what and how they are learning. The instructor in the case class is no longer the “automatic teller machine” spewing forth facts and theories, but the orchestra conductor attempting to elicit each student’s personal best. As with a musical group, the conductor is essential to achieving excellence. With case teaching, the teacher helps students work collectively through the material to understand it. Students are asked not only to learn the theory, but also to apply it to the messiness of the real world. In the process, students learn facts because they are central to case analysis; they also acquire requisite life long learning skills of analysis, communication, and collaboration because they are necessary tools to unravel the puzzle that is the case.

Although a case class may share characteristics with a good discussion seminar, even these two teaching strategies are not identical. A seminar discussion might revolve around debating two points of view articulated in class readings—for example, the neo-structuralist and the neo-monetarist perspectives on economic stagnation. A case class examines a real world problem of economic stabilization—say in Brazil in the 1980s—and asks students to pull competing perspectives out of the story itself. A good case presents the economic, political, and social facts of the policy problem, and requires students to grapple with the nuances of the situation. Either explicitly through role-playing, or implicitly through the questioning strategy of the instructor, the student’s lens for the case is very the complicated vantage point of the policy-maker—and not the clean pages of the textbook.

Potential Pitfalls to Case Teaching & How to Avoid Them

Time

The principal constraint in case teaching is time—cases take a lot of it. Many case teachers who mix cases with lectures find that six—plus or minus—is a good number of cases to include. Over the course of a tightly packed semester, therefore, you want to be sure you pick cases that will help you meet your learning goals, not interfere or interrupt that process. Cases are a central component of your syllabus. You will likely replace some of your text or article reading with cases; for most case teachers, this is well worth the effort given the benefit to students’ learning, and their remembering what and how they learned.

Learning Outcomes

Other limitations of case teaching include finding the right case to address your pedagogical objectives and content accuracy³ Cases should not simply be used because they might be fun. What, specifically, do you want your students to learn? What would you want to emphasize in a lecture format? Although several excellent case resources exist (see [Resources & References](#)), sometimes you will want to create your own to meet specific teaching objectives. In such instances, consider using newspaper accounts, congressional testimony, or proceedings of international meetings as “cases.”

Teaching Evaluations

Typically, faculty are evaluated by students at the end of the semester according to teaching performance. Students answer questions focused on a “sage on the stage” model of teaching: Was the instructor easy to follow? Free of distracting mannerisms? Did the instructor make good use of the board? Were lectures too fast or slow? Rarely is the focus of the evaluation on student learning.

3. These are discussed in Ann D. Velenchik, “The Case Method as a Strategy for Teaching Policy Analysis to Non-Majors,” *The Journal of Economic Education*, vol. 26, no. 1 (Winter 1995), p. 37.

An Incomplete List of Disciplines Where Cases Work Well

| | | |
|------------------------|-----------------------|--------------------------|
| Accounting | Data Processing | Philosophy |
| Allied Health | Drama | Photography |
| Arts | Economics | Professional Development |
| Biology | English | Psychology |
| Business | History | Reading |
| Communications | Human Services | Social Sciences |
| Computer Science | Human Studies | Sociology |
| Information Systems | International Studies | Speech |
| Counseling | Management | Telecommunications |
| Criminal Justice | Mathematics | Writing |
| Curriculum Development | Nursing | Zoology |

The ABCs of Case Teaching

Why Use Cases?

Case teaching enhances learning by engaging students in very powerful ways. Teachers use cases because they believe that students learn more when they are at the center of the process.¹ Case teaching actively connects students with course content and shifts responsibility for learning to students. With faculty as their guide, students simultaneously discover (or construct) a body of knowledge and master life learning skills.

The focus on process does **not** mean that facts, theories, and concepts are sacrificed. Good cases are chock full of information and require students to apply text-based theory to analyze complicated, real world events. The difference is that active learning promotes deeper understanding and improved retention.² Running cases helps build interpersonal skills that find significant resonance with life after the university where teamwork can be as critical to success as the ability to work through problems individually.³

1. Boehrer, 1990–1991; Susan Kuntz and Arthur Hessler, “Bridging the Gap between Theory and Practice: Fostering Active Learning through the Case Method,” ED 420–626. Paper presented at the 84th Annual Meeting of the Association of American Colleges and Universities (AAC&U), Washington, DC, January 15–17, 1998.

2. John Seely Brown, Allan Collins, and Paul Duguid, “Situated Cognition and the Culture of Learning,” *Educational Researcher* (January-February, 1989), pp. 32–42; J.A. Carlson and David W. Schodt, “Beyond the Lecture: Case Teaching and the Learning of Economic Theory,” *Journal of Economic Education* Vol. 26., No. 1 (1995), p. 17–28; “Deep Learning, Surface Learning,” *AAHE Bulletin* (1992); Diane F. Halpern, ed., *Changing College Classrooms: New Teaching and Learning Strategies for an Increasingly Complex World* (San Francisco, CA: Jossey-Bass, 1994); Oli R. Holsti, “Case Teaching: Transforming Foreign Policy Courses with Cases,” *International Studies Notes* Vol. 19, No. 2 (1994), pp. 7–13; M.W. Jackson and M.T. Prosser, “Less Lecturing, More Learning,” *Studies in Higher Education* Vol. 14, No. 1 (1989), pp. 55–68; Jon E. Travis, *Models for Improving College Teaching: A Faculty Resource* HE 029–856. (Washington, DC: ERIC Clearing House on Higher Education, 1996); Velenchik, 1995.

3. Because case teaching engages students so completely, the method also works well as a teaching strategy designed to reach different learning styles; by doing so, case teaching helps students learn “how-to-learn”—a skill valuable in any workplace. See for example, J.A. Anderson and M. Adams, “Acknowledging the Learning Styles of Diverse Student Populations: Implications for Instructional Design,” *New Directions for Teaching and Learning—Special Issue: Teaching for Diversity* 49 (Spring 1992), pp. 19–33; L. Curry, “An Organization of Learning Styles Theory Constructs,” Paper presented at the American Educational Research Association, Montreal, Quebec, April 1983 (ERIC Document Reproduction Service No. ED 235–185); H. Gardner, *Frames of Mind: The Theory of Multiple Intelligences* (New York, NY: Basic Books, 1983).

Faculty use cases because

- they are interesting and they are real;
- they make course content relevant to students in an extraordinarily powerful way;
- they demonstrate the application of, as well as limitations of, concepts and theories;
- they compel students to take responsibility for **their** learning; and
- alumni report that case learning contributed to their subsequent successes in law school, graduate programs, and careers.

The case method is consistent with a philosophy of teaching which

- assumes a major goal of higher education is to empower students to think critically and act responsibly in their various roles at work, at home, and in their communities;
- asserts that students must be able to apply the collection of concepts and facts they learned to new situations; and
- posits that integrating knowledge from other classes and/or life experiences is important.

Cases work in classes where teachers want students to

- sharpen their skills—both quantitative and qualitative—in analyzing material;
- enhance their ability to use new concepts and information to substantiate their arguments (learn to use empirical evidence to support their claims and why it is important to do so);
- improve their ability to listen and to communicate with faculty and other students;
- contest or refute the points of others, using reasoned argument;
- build on points made by others to develop a response that draws on the best thinking of a group;
- develop hypothetical solutions to problems; and
- examine the consequences of decisions they make

Finally, processing cases in a classroom setting can help faculty exercise “good practice” in their teaching.

Typical Student Comments: Learning Effectiveness— What Students Think About the Process

- I like using cases because I have a chance to voice my opinions and hear others; most of all, the discussions help me to sort through and understand what is going on in the case so I don't miss anything.
- The case discussions make events real—it is no longer just another name or act to be memorized, but the discussion brings the events and individuals to life.
- I really like these discussions. One thing we do not learn very well in college is teamwork. College is essentially an individual thing—I study alone; take tests alone. However, discussion helps me to learn from others.
- I love this class! It moves quickly and it's fun. It is tough not to be right all the time, though.
- I enjoy the case method because it forces me to think about issues and to take a stand in support of my opinion. It helps me think about why I believe what I do. It is hard for me sometimes to express my opinion in such a situation, but I am working on it here.
- What I like best are the broader insights I gain and the different perspectives that are represented.
- Case discussions are interesting and informative and are key to understanding [this course] because views differ and those differences mirror reality.
- The instructor was able to encourage debate and discussion while never getting off the topic. I always left the class thinking and feeling like I had learned something.
- Makes me think.
- Gives students the intellectual tools with which to evaluate a very complex part of the world.

Good Practice in College & University Teaching

- Encourages contact between students and faculty—especially contact focused on the academic agenda.
- Develops reciprocity and cooperation among students—teaching them to work productively with others
- Encourages *active* learning—thinking, doing, and thinking about what they are doing.
- Gives prompt feedback on performance—helps students figure out what to do in response
- Emphasizes time on task—provides lots of useful, productive, guided practice.
- Communicates high expectations—and encourages students to have high self-expectations.
- Respects diverse talents and ways of learning—engenders respect for intellectual diversity.

Source: Adapted from Chickering, A. and Z. Gamson, “Seven Principles for Good Practice in Undergraduate Education,” *AAHE Bulletin*, March 1987, pp. 3-7.

For further research on the value and application of the seven principles, see Astin, A.W., *What Matters in College?* (San Francisco, CA: Jossey-Bass, 1993); Baxter Magolda, M.B., “The Affective Dimension of Learning: Faculty-Student Relationships that Enhance Intellectual Development,” *College Student Journal* Vol. 21 (1987), pp. 46-58; Ewell, Peter T., et al., eds., *A Preliminary Study of the Feasibility and Utility for National Policy of Instructional “Good Practice” Indicators in Undergraduate Education* NCEES 94-437 (Washington, DC: U.S. Department of Education, Office of Educational Research and Improvement, National Center for Education Statistics, 1994); Light, R. J., *The Harvard Assessment Seminars: Explorations with Students and Faculty About Teaching, Learning, and Student Life*. First Report. (Cambridge, MA: Harvard Graduate School of Education and Kennedy School of Government, 1990); Light, R. J., *The Harvard Assessment Seminars: Explorations with Students and Faculty About Teaching, Learning, and Student Life* Second Report. (Cambridge, MA: Harvard Graduate School of Education and Kennedy School of Government, 1992); Pascarella, E.T. and P.T. Terrinzini, *How College Affects Students: Findings and Insights from Twenty Years of Research* (San Francisco, CA: Jossey-Bass, 1991); Pintrich, Paul R., “A Process-Oriented View of Student Motivation and Cognition,” in J.S. Stark and L.A. Mets, eds., *Improving Teaching and Learning Through Research—New Directions for Institutional Research*, No. 57 (San Francisco, CA: Jossey-Bass, Spring 1988a); Pintrich, Paul R., “Student Learning and College Teaching,” in R.E. Young and K.E. Eble, eds., *College Teaching and Learning: Preparing for New Commitments—New Directions for Teaching and Learning*, No. 33 (San Francisco, CA: Jossey-Bass, Spring 1988b).

The **ABCs** of Case Teaching

Some Musings of a Case Teacher

prepared by
PAT TOWER
Professor, Philosophy, United States Air Force Academy

Why Be a Case Teacher?

To all outward appearances case teachers defy a standard profile. In reality, however, case teachers hail from disciplines as diverse as mechanical engineering, business, geography, history, sociology, philosophy, physics, and international relations. Case teachers thrive at institutions as diverse as the National Defense University, Mt. Holyoke, Duke, California State Universities, and Minnesota. At UCLA, cases are used to teach medical students the nuances of diagnosis; at Harvard, they are the prime vehicles for teaching government professionals the intricacies of diplomatic negotiation; at Syracuse, Brandeis, Haverford, and Yale, they are used to teach undergraduates the principles of economics; and at the Air Force Academy, they are used to teach ethics, international relations, the visual arts, and social psychology to aspiring officers. Cases have even been used by USC faculty to teach the value of interpersonal understanding to members of LA street gangs.

Although case teachers cannot be distinguished by outward standard profile, they do seem to share an inward one. Case teachers are absolutely committed to

- student learning, not professors' teaching;
- preparing this generation of students to become the next generation of serious scholars, competent professionals, community leaders, and engaged citizens;
- helping students develop the skills they will need to function as full-fledged purveyors and consumers in the marketplace of ideas and as citizens of an increasingly competitive world *polis*;
- creating curious, critically reflective, self-starting members of an intellectual community, who enjoy a lifelong thirst for knowledge and understanding; and
- developing students who recognize their own responsibility for the quality of the knowledge they possess.

In short, case teachers are risk takers, willing to experiment with pedagogies which promise to turn classrooms into active learning communities.

What Is the Case Method?

The case method is not mysterious. Its pedagogic underpinnings are straightforward. In international relations, cases explore diplomatic negotiations on the eve of war or peace crises in foreign policy decision-making, military actions with unintended consequences politically complex trade disputes and financial accords, international legal tangles, or global environmental dilemmas.

Cases need not be restricted to narrative descriptions of major events in world history; they can be any slice of shared reality that compels students to come to terms with “multi-layered problems seen from multiple perspectives”. For example, a case could be a pile of wreckage from an aircraft accident, a limestone cave system under a Western aquifer, or an octogenarian bricklayer with chest pains. What caused the crash? How were these caves formed? And why is this man suffering shortness of breath and constriction of the chest muscles?—such decision-forcing questions establish direct and immediate intercourse between the mind of the student and the subject-matter of interest.

The case teacher’s task is to “frame” the case with questions that compel students to “inhabit” the case that they must seek the best available answer under similar decision-making constraints as those prevalent in the “real” event. Students assume a large measure of responsibility for both course content and the learning process. As they proceed through their collaborative deliberations, they not only discover facts and principles germane to the assigned specimen, but they also begin to reflect on and discover facts and principles germane to the investigative process itself. As they “unpack” the case, they seek a collective answer to “What is the essential nature and significance of the specimen?” Meanwhile, they are also busy with questions like, “What are the properties of a good analysis?,” and “What constitutes acceptable argumentation?” *Despite the frequent temptation to do otherwise, a case teacher refuses to cheat students by giving away the answers, recognizing the powerful learning that occurs when students discover and construct their own knowledge base.*

The point is made by a study carried out by the Socony-Vacuum Oil Company that concludes that students retain 10% of what they read; 26% of what they hear; 30% of what they see; 50% of what they see and hear; 70% of what they say; and 90% of what they say and do.

From the very first day, a case teacher carefully builds an intellectual acceleration chamber within which class deliberation is sparked and becomes self-sustaining. The teacher creates an intellectual chain reaction which requires and welcomes participation from everyone in order to reach intellectual critical mass. If the control rods are removed too soon or unevenly, then the reaction may accelerate beyond all reclamation, producing a sort of classroom Chernobyl. If controls are never removed or are not removed in the right sequence, the reaction may never become truly self-sustaining.

For these reasons, C. Roland Christensen claims that “discussion teaching is the art of managing spontaneity”—an art requiring every teacher to achieve a “dual instructional competency”:

The responsibilities may be difficult to appreciate at first. For example, effective preparation for discussion classes takes more time, because instructors must consider not only *what* they will teach, but also *whom* and *how*. And the classroom encounter consumes a great deal of energy; simultaneous attention to process (the flow of activities that make up a discussion) and content (the material discussed) requires emotional as well as intellectual engagement. Effective discussion leadership requires competency in both areas; it can be achieved only with patience.

As Christensen suggests, a rather sobering observation attends the dual competency requirement: far from being a labor-saving technique, the case method involves extra work for any educator who attempts its proper application. Creating a viable case course means that topic sequencing, lesson allocation, and course policies complement and are complemented by case discussion. A teacher must also select just the right number of cases, ensure those cases are integrated into the general flow of the course, and see to the selection of the best available case for pre-identified course objectives. Moreover, the teacher must make allowance in the course for opportunities to conduct post-mortem assessment of case effectiveness so that real-time adjustments to the adding list and topic sequencing can take full advantage of benefits harvested from active discussion.

Is It Worth the Effort?

The case method works and it works well or at least makes a positive difference in the following areas:¹

- ***Framing and resolving ill-defined problem*** . The method makes plain that real problems taken from the real world do not easily fit predetermined categories nor are they easily resolved with the handy algorithms we have at our disposal. The case method gives students the vital practice they need to get their arms around “messy” problems and to formulate possible tools for analysis and resolution.
- ***Thinking and communicating on one’s feet***. The case method also develops the communications skills students will need in informal, spontaneous discussions such as those occurring daily around the boss’s conference table in business and at professional meetings. By working on cases, students must penetrate the substance of the case quickly, analyze, and then articulate their conclusions in way persuasive to others in the group.
- ***Writing skill*** . Interestingly enough, thinking on one’s feet easily becomes thinking at the tip of the pen. To write an analysis or argument well, one must anticipate the questions and objections of others. Such anticipations are developed and

1. Holsti, 1994; Hunt,P., “The Case Method of Instruction,” *Harvard Educational Review* 21 (1951), pp. 2–19.

honed in the heat of the case discussion.

- **Community building.** While not normally a prime goal of higher education, case discussion can effectively build community—a safe environment with a very strong extrinsic value: it is indispensable to the long term development of skills like those listed above.
- **Subject-matter knowledge.** As already suggested, the facts, principles, and concepts learned by students during case discussions have far greater “stick-ing” power than those ingested from the professor.

Unfortunately, most “hard” evidence for these claims is anecdotal, perceptions measured by student critiques. Nevertheless, available evidence warrants the inference that the case method is at least worth trying, and the best evidence we have is this: very few of those persons who try the method regret the decision. The vast majority cannot imagine teaching any other way, and this in part explains the dearth of hard evidence: No case teacher has the heart to create a control group deprived of the case method.

Look for cases that tell fascinating stories and address disciplinary complexities, debates, sub-fields, assumptions, and principles.

A good case does not have to be long.¹ Students like cases that are 3–7 pages, not including charts, supporting documents, and references. Shorter cases generally mean students are better prepared for discussions, because they have more time to read cases more thoroughly. A shorter case also works better in undergraduate classes that are only fifty minutes long.

To select a case, you will want to read it two or three times yourself. Do not select a case just because the topic matches your research or teaching interests. You want to consider how the case fits with your learning and teaching objectives for the class. Cases are not meant to substitute for a text or a journal article; rather, cases are supplemental teaching vehicles that illustrate theoretical claims and disciplinary concerns, assumptions and insights. As students “inhabit” a decision-making situation in a case, they have an opportunity to practice skills that they will use later in their careers. Carefully consider the specific affective and cognitive skills you would like your students to practice.

Computers & the Outside World of Case Teaching

The Pew Faculty Fellowship sponsors *CaseNet*, a cyberspace conversation on active learning in international affairs. *CaseNet* comprises a World Wide Web site and an E-mail listserv. On *CaseNet*, you will find course outlines that include cases, notes on teaching specific cases tips on case teaching, and a discussion forum in which to raise questions and exchange ideas. To find out how you can participate, connect to

<http://csf.colorado.edu/CaseNet/>

1. Couture, B. and J.R. Goldstein, *Cases for Technical and Professional Writing* (Boston, MA: Little, Brown & Co., 1984); Field, J. and R. Weiss, *Cases for Composition* (Boston, MA: Little, Brown & Co., 1977); Lou Ortmayer, “Decisions & Dilemmas: Writing Case Studies in International Affairs,” *International Studies Notes*, Vol. 19, No. 2 (1994), pp. 28–33; Dorothy Robyn, “What Makes a Good Case?” N15-86-673 (Cambridge, MA: Kennedy School of Government Case Program, 1986); Steven D. Wrage, “Best Case Analysis: What Makes a Good Case and Where to Find the neYou Nee,,” *International Studies Notes* Vol. 19, No. 2 (1994), pp. 21–27.

Set the tone early in the semester—*participation will matter*.¹

Typically we spend a lot of time planning our courses. We agonize over which texts and cases to use, which topics to cover and in what sequence, how much reading to assign per week, and when to plan assignments or examinations. Preparing the syllabus, case, and lecture notes is only half the picture, however. We must also *prepare the students for participation* in an active classroom. The goal is to establish an environment where participation is the norm, and where students feel comfortable joining the conversation. Frequently, this means you will have to change the expectations most students have when they enter your classroom.

Most students are accustomed to lecture, not participatory, classes. Despite what the syllabus says, students have likely learned that they are only *really* required to read right before a test, since they routinely participate via their pens and their ears. Silence is golden; students and professors often consider it a sign that they are paying close attention to the lecture.

Changing your teaching to include active learning techniques requires changing classroom culture. On the first day of class, put students on notice that this class is going to be differ-

1. There are many wonderful resources that offer a variety of techniques for succeeding at active learning. The following is a short and incomplete list of some of the best: L.B. Barnes, C.R. Christensen, and A.J. Hansen, eds., *Teaching and the Case Method*, 3rd Edition (Boston, MA: Harvard Business School Press, 1994); Eileen Bender, Millard Dunn, Bonnie Kendall, Catherine Larson, and Peggy Wilkes, eds., *Quick Hits: Successful Strategies by Award Winning Teachers* (Bloomington, IN: Indiana University Press, 1994); Robin Fogarty, *Best Practices for the Learner-Centered Classroom: A Collection of Articles* (Arlington Heights, IL: IRI/Skylight Training and Publishing, 1995); Wilbert J. McKeachie, et al., *Teaching Tips: Strategies, Research, and Theory for College and University Teachers*, 9th edition (Lexington, MA: D.C. Heath, 1994); McKeachie, P.R. Pintrich, Y.G. Lin, and D. Smith, eds., *Teaching and Learning in the College Classroom: A Review of the Research Literature* (Ann Arbor, MI: National Center for Research to Improve Teaching and Learning—NCRIPAL—University of Michigan, 1986); Mel Silberman, *Active Learning: 101 Strategies to Teach Any Subject* (Des Moines, IA: Prentice-Hall, 1996); Stocking, S. Holly, Eileen T. Bender, Claude H. Cookman, J. Vincent Peterson, Robert B. Votaw, eds., *More Quick Hits: Successful Strategies by Award Winning Teachers* (Bloomington, IN: Indiana University Press, 1998); Wassermann, S., *Introduction to Case Method Teaching: A Guide to the Galaxy* (New York, NY: Teachers College Press, 1994); Wassermann, *Getting Down to Cases: Learning to Teach with Case Studies* (New York, NY: Teachers College Press 1993); Wely, W.M., "Discussion Method Teaching," *Change* (July/August, 1989), pp. 40–49; Wilkinson, James "Crossing the Rubicon: Twenty-Four Faculty Transform Their Teaching," *Change* (November/December, 1993), pp. 52–58.

ent—participation **will be** crucial to their success.² Be patient, but firm about the seriousness of the requirement. Remind them that, when you run a case, everyone has had access to the same material. Provide plenty of opportunities for students—shy, uncertain, cautious—to participate in a non-threatening environment. To do this, think about what “soft-ball” questions you will use so students feel comfortable engaging in class discussions.

Student Preparation Strategies

Define Your Terms

Perhaps the most obvious but least utilized strategy is simply to **explain** why you require participation—it enhances and improves learning.³ Emphasize how important preparation is to good participation; and “make their active engagement a consistent feature of the class.”⁴ **Define** what **you** mean by participation. To demonstrate just how critical this component of your course will be, spend significant time with your students on this topic. Consider adapting the [Participation Experience Inventory](#) to help you achieve this goal.

Remember the potential power of the computer as a communications tool. Where students and faculty have access, E-mail can serve as an extension of your classroom. Case classes are high energy classes; students often want to talk more about case ideas. With a class e-mail (one nickname address that sends to all class members), or even a listserv, students can continue to discuss the case after the time period is over.

You can also use E-mail as a teaching tool. Case driven classes don’t always have the same sort of order and control as lecture classes. After the case has been run, invariably you will think of things you wish you had said or issues you had hoped to develop further. With E-mail, you get a second chance. Concepts that may not have been clearly illuminated, points that somehow got lost in the discussion, general lessons that were mentioned but bear re-emphasis are all effectively communicated via E-mail. Finally, consider using E-mail to reach out to students who are less comfortable coming to office hours or who may have schedules that conflict with yours. E-mail cannot face-to-face communications, it can be a beneficial supplementary tool for good teaching and advising.

Offer Wise Counsel

Give your students practical advice about how to prepare for participation in a case class. A careful reading of a case prior to class is probably not going to be enough preparation. Stu-

2. When asked what their professors mean when “Participation” is listed as a requirement for a good grade, students overwhelmingly respond that “participation” means “attendance.”

3. Angelo, Thomas A. “Relating Exemplary Teaching to Student Learning,” *New Directions for Teaching and Learning*, No. 65 (Spring 1996), pp. 57–64; Travis, Jon E., “Models for Improving College Teaching: A Faculty Resource,” *ERIC Digest*, (Washington, D.C.: George Washington University, Graduate School of Education and Human Development, 1996); Fogarty, Robin, *Best Practices for the Learner-Centered Classroom: A Collection of Articles*, (Arlington Heights, IL: IRI/Skylight Training and Publishing, Inc., 1995).

4. Boehrer, 1995/6, p. 5.

dents must read, assimilate, question, and speculate prior to class for the classroom experience to move quickly to sophisticated levels of analysis. For most students, it is simply too hard to think about the complex issues in a case as it is rapidly unfolding in the class without having had the opportunity to spend time with the issues, the data, and the possible solutions *before* class.

Or, give them something in writing to remind them about **Preparing for Case Method Discussion**.

Some Hints for Students on Preparing Cases

- Skim the case first.
- What are the broad issues?
- Are there data appendices to consider?
- Reread the case carefully. Make margin notes.
- What are the key problems in the case? Make a list.
- Prioritize these problems.
- Develop a set of recommendations
- Evaluate your recommendations vs. alternatives.
- Discuss your analysis with others in the class.

Derived from the list by Sharon McDade in "An Introduction to the Case Study Method: Preparation, Analysis, and Participation," *Case Study Method Note* (Cambridge, MA: The Institute for Educational Management, Harvard University, 1988); see also C. Lang, *Case Method Teaching in the Community College: A Guide for Teachign and Faculty Development* (Newton, MA: Education Development Center, 1986).

Provide Study Questions

Study questions should provoke careful thought but avoid driving students to premature conclusions. They can help focus attention on specific aspects of the case, guiding students to pre-discussion ruminations that will prove valuable during class. Many case teachers assign study questions to guide a student's reading of the case, handing them out prior to the class session. Others use study questions at the beginning of a class for small group interaction. This use of study questions helps to orient students to case issues when they come into class after several days off. This technique can help the unprepared student to become at least partly engaged in the material for the day. Study questions can be similar in form and content to the discussion questions

planned for use by the teacher during the actual case discussion, or they can focus on the main themes in a more general way. Either way, they are aimed at stimulating the student to think before the case discussion actually starts.

Provide Clear Incentives

It may not be enough to tell students they must prepare differently. Sometimes pre-class or quick opening class exercises help students process the case they read. You can grade these exercises as you would any other assignment, or simply use a ✓, ✓+ , ✓- approach.

Individual exercises create opportunities for the less vocal to find their voices. You might require students to write a short reaction paper or a policy brief, which describes the problem, analyzes the situation, and presents alternatives. To be most effective, assignments should be frequent and provide timely feedback to the student for subsequent assignments.⁵

You can also make participation part of the evaluation process. Research suggests that participation has at least three components:⁶

- *Preparation*—reading the materials ahead of time, thinking about the reading and how it is connected to other course materials;
- *Speaking*—offering insights, observations, analysis, opinion; asking questions; **and** responding to another student’s comments; and
- *Listening*—to what others have to say, following the arguments, and remembering the points.

If you agree, consider adapting any or all of the following evaluation formats—individual and/or group—several times during the semester so that you have a mechanism to provide feedback to students regarding their performance—giving them reinforcement for what they have done and specifying things to work on in future classes (e.g., the overbearing student should listen more, the shy student writes great analyses and students should be able to benefit from her insights, and so forth). You might also consider a system allows for the learning curve students often experience as they adjust to an active learning class. Use a mid-semester evaluation as a goal-setting exercise. Asking students to set a goal for the second half of the semester provides an incentive for changing patterns of participation, particularly if you allow students to improve low first half grades with a great turn-around in performance.

5. Trudy W. Banta, “Moving Assessment Forward: Enabling conditions and Stumbling Blocks,” *New Directions for Higher Education* Vol25, No. 4 (Winter 1997), pp. 79–91; Carlson, J.A., and D.W. Schodt, “Beyond the Lecture: Case Teaching and the Learning of Economic Theory,” *The Journal of Economic Education*, vol. 26, no. 1 (Winter 1995), p. 18; F.E. Fulkerson and G. Martin, “Effects of Exam Frequency on Student Performance, Evaluations of Instructors, and Test Anxiety,” *Teaching Psychology* Vol. 8 (1981), pp. 90–93; Diana K. Kelly, Michele Miller, and Michelle Wilder, “Increasing Involvement in Learning with Classroom Assessment,” pp. 264–280 in Philip H. Dreyer, ed., *Knowing: The Power of Stories—55th Yearbook of the Claremont Reading Conference* (Claremont, CA: The Claremont Graduate School, 1991).

6. Criteria for the Assessment of Oral Communication National Communication Association—A National Context, <http://www.natcom.org/InstrResour/assessment/CriteriaAssessment.htm> (Annandale, VA: National Communication Association, nd); Anne Henderson, “Assessing Speaking and Listening Performance: A Review of Issues and Methods,” Paper presented at the International Studies Association Meetings, San Diego, CA, 1995; T.J. McLaughlin, L.P. Blum, and David M. Robinson, *Cases and Projects in Communications* (Columbus, OH: Charles E. Merrill Books, Inc., 1965; Nancy A. Mead and Donald L. Rubin, *Assessing Listening and Speaking Skills*. ERIC Digest. ED 263–626—<http://ericae.met/edo/ED263626.htm>—1985; Speech Communication Association, *Resources for Assessment in Communication* (Annandale, IL: Speech Communication Association, 1984).

Evaluation Forms

- [Class Participation Self-Evaluation](#)
- [Case Analysis Question](#)
- [Peer and Self-Evaluation Form: Team Case Presentation](#)

Gender and Race in the Case Class

Case teaching engages students in material at an emotive as well as at a cognitive level. Learning is not simply a process of acquiring information but of processing that information through a set of personal beliefs and opinions. It is both objective and highly subjective. It is therefore potentially explosive.

You need to be aware of differences that might create tensions in your classroom. Research suggests that men and women learn differently.⁷ At the risk of generalizing, male students tend to be more competitive, goal oriented, and less disturbed by mistakes made along the way. Women, often taught to nurture, seek to understand relationships or how things are connected before coming to conclusions. While certainly many women behave like stereotypical men, and many male students exhibit characteristically female traits in the classroom, case discussions that are aggressively provocative may alienate female participants who have not learned to jump into the fray. Conversely, if your case classes are discursive

7. Anderson, J.A. and M. Adams., "Acknowledging the Learning Styles of Diverse Student Populations: Implications for Instructional Design." *New Directions for Teaching and Learning—Special Issue: Teaching for Diversity* 49 (Spring 1992), pp. 19–33; Blythe McVicker Clinchy, Nancy Rule Goldberger, MaryF. Blenky, and Jill Mattuck Tarule, *Women's Ways of Knowing: The Development of Self, Voice, and Mind* (New York, NY: Basic Books, 1997); David Ellis, *Becoming a Master Student*, 7th Edition. (ND: College Survival, 1994); Joseph R. Feagin, Hernan Vera, and Nikitah O. Imani, *The Agony of Education: Black Students at White Colleges and Universities* (NJ: Routledge, 1996); Carol Gilligan, *In a Different Voice: Psychological Theory and Women's Development* (Cambridge, MA: Harvard University Press, 1993); Ellen Hoffman, and Bernice Sandler, *Teaching Faculty Members to Be Better Teachers* (Washington, DC: Association of American Colleges and Universities, 1992); Krupnick, C.G. "Women and Men in the Classroom: Inequity and its Reminders." *Journal of the Harvard-Danforth Center* (1985), pp. 18–25; McIntosh, Peggy, "White Privilege: Unpacking the Invisible Knapsack," *Independent School* Vol. 49, No. 2 (Winter 1990), p. 31; Martin G. Murray and Turdie K. Peterson, "Diversity in the Classroom: Gender Related Examples," Paper presented at the Joint Meeting of the Southern States Communication Association and the Central States Communication Association (Lexington, KY, April 14–18, 1993); Norman, Carrie E. "Tips for Teachers: Encouraging Women's Class Participation." (Boston, MA: Harvard-Danforth Center for Teaching and Learning, 1989); Bernice R. Sandler, "Women Faculty at Work in the Classroom, or, Why It Still Hurts To Be a Woman in Labor" (Washington, DC: Center for Women Policy Studies, May 1993); Sandler, and Roberta Hall, *The Campus Climate Revisited: Chilly for Women Faculty, Administrators, and Graduate Students* (Washington, D.C.: Project on the Status and Education of Women, Association of American Colleges, 1986); Marilyn R. Schuster and Susan Van Dyne, eds., *Women's Place in the Academy: Transforming the Liberal Arts Curriculum* (New York, NY: Rowman & Littlefield, 1985); Deborah Tannen, "Teachers' Classroom Strategies Should Recognize that Men and Women Use Language Differently," *The Chronicle of Higher Education* (June 19, 1991a); Tannen, *You Just Don't Understand* (New York, NY: Ballantine Books, 1991b); Tatum, Beverly Daniel and Phyllis C. Brown, "Breaking the Silence," *Knowledge Quest* Vol. 27, No. 2 (November 1, 1998), p. 12; Tatum, "Talking about Race, Learning about Racism: The Application of Racial Identity Development Theory in the Classroom," *Harvard Educational Review* Vol. 62, No. 1 (February 1, 1992), p. 1.

and value collaboration, some students, often male, more comfortable with quick logic and individual merit, might find the classroom disorganized and purposeless.

Making students self-conscious about different learning styles goes a long way to help bridge differences. Sometimes women don't even realize that they are deferring to their male counterparts in the classroom. Simply noting, "in the last class male participation was about twice as frequent as female"—and asking why they think that is—may serve to improve participation. You are well advised to reflect on your own behaviors. Count how often you call on men versus women. Even the most egalitarian instructor often finds the result biased toward men, simply because their hands shoot up quickly and catch your eye. Pausing long enough to give all students a chance before calling on someone might surprise you.

Racial and ethnic differences can be a classroom challenge as well. To the degree that case classes are more emotional than lecture classes and engage student experiences at a deeper level, racial tensions in a classroom can be exacerbated. Out of class conferences may help to ensure that differences are comfortable and productive. It is absolutely critical not to assume that person's race or ethnicity prepares them to represent the entire race or ethnic group.

Participation Experience Inventory

Please take a few moments to respond to the following statements. Based on your previous classroom-related experiences, circle the number that best indicates the extent of your involvement in the activities indicated.

Part A: Extent of Involvement N = NEVER
 R = RARELY
 S = SOMETIMES
 F = FREQUENTLY

- | | | | | |
|---|---|---|---|---|
| 1. I have asked questions in class | N | R | S | F |
| 2. I have asked the instructor questions before/after class | N | R | S | F |
| 3. I have led a class discussion | N | R | S | F |
| 4. I have participated in a class discussion | N | R | S | F |
| 5. I have given an individual presentation in class | N | R | S | F |
| 6. I have participated in a group presentation in class | N | R | S | F |
| 7. I have participated in a learning exercise in class (e.g., game, simulation, cooperative learning task, etc.) | N | R | S | F |
| 8. I have worked with a group of students on a class project outside of class (e.g., game, simulation, etc.) | N | R | S | F |
| 9. I have completed homework in a study group | N | R | S | F |
| 10. I have used E-mail to communicate with my instructor about course related matters | N | R | S | F |
| 11. I have used E-mail to communicate with my classmates about course related matters | N | R | S | F |
| 12. I have used groupware (software such as Lotus Notes) in a course | N | R | S | F |

Participation Experience Inventory (continued)

Part B: Your Experience of Participation in Other Classes

Please complete the following open-ended statements:

1. When an instructor says “You are expected to participate in this class,” I understand this to mean

2. When an instructor counts participation as 10% or 15%, for example, of your grade, the instructor has evaluated my participation b

3. I would be more inclined to participate in classes if

Please provide the following information:

Male _____ Female _____ Major _____

Freshman ___ _Sophomore___ Junior ___ Senior ___ Other ___

Preparing for Case Method Discussions

We will be using formal case studies as the basis for class discussions this semester. As noted in the syllabus, the case study discussions represent a significant portion of your final grade. You will, therefore, want to do as well as you can in them. The following guidelines and suggestions are meant to help you achieve your best performance.

1. Form a study group to prepare for case discussions
 - a. Experience and research both show that preparing cases alone is not as productive (nor as much fun!) as doing it in groups. Not only do study groups help improve your own skills, you also can learn from other students' think patterns and problem-solving styles.
 - b. Use the study group to present, informally, analysis to others, to practice articulating your ideas, to get feedback on both the ideas and presentation, to compare different views, to refine and rethink positions, and to build confidence for making contributions to the case discussion with the whole class.
2. Read the case meticulously
 - a. *Peruse the case*: Quickly look at the case by reading the introduction and conclusion, and by skimming the rest of the contents. Now you know what you are getting into.
 - b. *Quickly read the case*: Read the entire case rapidly, without underlining or highlighting. You now know the basic structure of the case and where the main information is.
 - c. *Make a brief outline*: Who is involved in the case? What problems do they face? What is their situation like?
 - d. *Set preliminary goals*: What do the study questions ask? What will it take to answer them? What issues in the course does the case involve?
 - e. *Re-read the case*: Focus on the important information that was located during the skimming, and take initial steps toward answers to the preliminary questions. Highlight, underline, or make marginal notes to organize the details and record new thoughts or questions generated by reading.
 - f. *Re-formulate the problem*: What is the case really about? What issues are central to the problem? What conflicts between ideas, perspectives, or values are involved in deciding what action to take? Whose interests are really at stake? What are the alternatives?

- g.** *Work the problem:* Answer the specific study questions, using the relevant information located during the reading and study group session. Make thoughtful assumptions about the information that is *not* available in the case.
 - h.** *Write the answers to the case analysis exercise questions: **Answers are due the first day of the case discussion.***
3. Prepare case writing assignments very carefully. Doing so will require you to know the case well and thus be better prepared to discuss it in class.
- a.** Answer only two of the study questions given for each case as part of your assignment. (If you decide to answer more than two as a method of studying that is fine. I will only grade two answers—the first two I see!)
 - b.** Each answer should comprise one or two coherent, well-written pages that really do answer the question. Many questions do not have a right or wrong answer. Credit will be given for answers that demonstrate thoughtful, careful reading of the case, originality, analysis, good writing and neatness.
 - c.** Essays must be ***typed*** or ***word-processed***.
 - d.** Essays are an ***individual*** project! You should not cooperate with any other student in writing the case analysis exercises. However, you should explore ideas and discuss your thoughts within the study group.
 - e.** Essays will be evaluated on the basis of *both* substance and style. [Should your grammar inhibit my ability to understand what you are trying to say, you have problem!] Hence, essays should be well organized; written in clear, coherent sentences and paragraphs; follow the common canons of good grammar (complete sentences, no split infinitives, appropriate use of commas, etc.); use only correctly spelled words. To be safe, it is usually best to proofread before handing in a paper.

Class Participation Self-Evaluation

NAME _____

To participate effectively in class discussion you need to

Attend class regularly;

Prepare by studying the material carefully **before** class;

Listen to what others say during the discussion; **and**

Speak (*contribute your views/analysis*) on topic during the discussion.

As you evaluate your own participation in class discussions, consider all **four** factors. You must attend regularly and come prepared, listen carefully to your colleagues (fellow students) and your professor, and contribute (through questions or relevant commentary) in class to evaluate yourself at the highest level.

Circle the number below, which is your assessment of your participation to date.

0 = unprepared, uninvolved

1 = one element

2 = two elements

3 = three elements

4 = all four elements

In the space below, write a sentence or two justifying your self-evaluation.

Professor's assessment (my turn . . . I will assess your assessment!)

Case Analysis Question

(Due Next Class Session)

Name: _____ Participation Score: _____

Case: _____

Your Self Evaluation:

Your Goal for the Next Case:

Professor's Evaluation:

Please answer the following questions on a separate sheet of paper and staple to this sheet when you turn in the assignment.

- 1) How would you change your case analysis after today's class session?
- 2) What overall lessons do you take from this case?

Peer and Self Evaluation Form: Team Case Preparation

Please grade yourself and your teammates on a scale of 1-5.

- 5 Exceptional team member; evidenced leadership both in terms of understanding the problem as well as in the mechanics of the case write-up.
- 4.5 Excellent job; Strong theoretical background; active participant in refining the group's argument for the policy brief.
- 4 Very good; strong team member; did his or her share of the work.
- 3.5 Good; contributed, but really didn't add much to the group
- 3 Clearly lacking in preparation and input.
- 0 Did not participate.

Your Name _____ Score _____

Explanation:

Team member _____ Score _____

Explanation:

Team Member _____ Score _____

Explanation:

Team Member _____ Score _____

Explanation:

The **ABCs** of Case Teaching

Saving the Case: “The 2 x 2 Problem”

Problem

Classes with mixed expertise can be frustrating. For example, my classes are divided on two dimensions: class level (sophomores and seniors) and majors (economics and international studies). The problem is exacerbated by the fact that the seniors are the economics majors and the sophomores are the international studies majors. I want to keep the class at a level appropriate and accessible to each group. Naturally, the seniors know more than the sophomores. “Experts” in using economic theory to make their point, they intimidate the younger students into silence.

Possible fix

Establish an implicit classroom contract that acknowledges different levels of knowing and anticipates appropriate participation by level. Younger, less experienced students are invited to respond to easier opening questions, or to questions grounded on pre-class writing assignments and study questions. Encourage students to keep notes in front of them—a case class is not a test. As they experience validated participation, they may feel emboldened to move to more sophisticated analysis.

Suggestions for long-term correction

Use the differences. If the structure is part of your class composition every semester, explicitly acknowledge different rules for different players, at least up to mid-semester. If you require group work prior to case classes, mix the majors and class years. Let students know that, because they have different backgrounds, you have different expectations of their performance—but everyone has a role to play. International studies students can push their ahistorical economics peers outside the boundary of theory. Younger students do graduating seniors a service by asking them to explain and clarify—in a few months they are going to have to explain these concepts to colleagues in the working world. Participation grades can be explicitly tied to moving beyond a student’s own level of expertise.

The ABCs of Case Teaching

Strategies of Engagement

prepared by
MARYANN K. CUSIMANO
Catholic University of America

Arranging the Classroom

Whenever possible arrange desks in a semicircle, or some layout that allows students to face each other; this will facilitate direct exchange. If students can see only you and are directed only to the front, they are likely to listen and direct comments to you, not to each other.

Name Tag Strategy

Think about requiring each student to use a name plate to allow students (and YOU) to learn names. This also encourages students to take responsibility for their own contributions to the class (since they cannot remain anonymous), helps students build on classmates' comments ("Here's where I disagree with John..." or "expanding on Jane's idea"). Name tags can also be used to take attendance without the need for a roll call.

To make sure name tags are *readable* . . . bring a set of *old* manilla folders cut in half to make a name plate "tent" *and* a couple of large marker pens. Ask students to write their first names on the tents, and to bring them to class regularly . . . it works!

Getting to Know You

Consider distributing index cards and asking students to fill out their name, year in the program, major, other courses they've had in this field, related background (study abroad or work experience, for example), interests (either specific topics of interest they would like to

cover in the course, or outside interests), and how comfortable they feel speaking in class. This information helps you get a handle on where the class is coming from, what “experts” you may have to serve as class resources on particular topics, which students may have special interests or needs, and which students may need more coaxing to bring them out.

Not only does this data help you figure out how and to whom to pitch certain material, but it also serves as an icebreaker for the students. In the second class meeting, give them a brief sketch of their class (“1/3 of you are sophomores, 2/3 juniors and seniors”). Reviewing the class portrait gives you a chance to reassure those who are intimidated by the prospect of speaking in public (“for those of you feeling a bit nervous about class discussion, you are not alone—1/3 of you feel this way, but as you get some practice and experience doing it, it gets easier . . .”).

Using the Syllabus

Part of the first day ritual is distributing the syllabus; this too can be an opportunity for creating a participatory classroom climate. In addition to course content and assignments, the syllabus can explicitly address what the case method is, why you are using it, what is required of students in a case class, what type of classroom participation you encourage, and how classroom participation will be assessed. In the world beyond the classroom, students will need to think critically for themselves, to question what they read and hear, to listen, speak, and write in a clear and coherent manner. Students can only hone these skills if they have the chance to practice them. Additionally, educational research indicates that students remember better and for a longer period of time, information and analysis which they helped construct.¹ The case method increases retention of information and improves communication skills. Along the way students get to know each other, and hear more diverse viewpoints concerning issues.

Try this . . .

Before you distribute the course syllabus (or put it on the web), ask students to form pairs. Explain that they each have 2 minutes to introduce themselves to their partner—including year/semester standing, major, relevant interests (whatever you want them to know about each other). Then the pairs will form groups of four (4) and each person will introduce his partner (not him/herself). Next, ask each group of 4 to come up with a set of questions they have about the class. . . . THEN distribute the syllabus and ask the students to read it to see if the syllabus answers the questions they had. If questions remain, then they should ask someone in their group first . . . and finally, ask you—the professor—what questions remain.

1. Angelo, 1996; Boehrer, 1990-1991; Travis, 1996; Fogarty, 1995.

Benefits:

You create an environment where everyone can feel safe speaking, since there are no right/wrong answers here

- Students actually READ the syllabus. (I find this cuts down dramatically on subsequent syllabus questions throughout the semester!)
 - Confusions are clarified.
 - Students learn it is OK to ASK questions as well as to ANSWER them!
-

Creating the Climate

Resist the temptation to *lecture at* students about *case participation*. Instead, try to establish some participatory dynamics getting students to talk on the first day. Use an ice-breaking exercise which requires each student in class to speak, keeping it simple, and at a low-threshold of risk. You might ask each student to give their name, hometown, and a more open-ended question, such as what do you do when you are not in this class, or what did you do over break. This can be hard for some folks. Stammering or blushing is often involved. But it breaks the ice and gets them talking, allows them to start to get to know each other and underlines that participation will be a regular part of the class. It also is an opportunity to draw students out on some easy terrain, and you usually get some tension-breaking laughs over something. Since turn-about is fair play, you should then introduce yourself, revealing some personal information (hometown, or what you did over break), and some professional information (research interests, for example). In larger classes you might ask small groups of students to interview each other.

Just Do It!

Talking about case method is no substitute for doing cases. While planning how many and where to use in the semester is partly a function of availability, fit, and personal preference, it is advisable to use enough cases for students to become comfortable and proficient with the method, and to run one early in the semester to establish class culture and expectations.

You might run a “mini” case at your first class meeting (following introductions and examination of the syllabus), and each class meeting of the first week or two. This solves the problem of people add/dropping in and having missed your socialization/ice breaking session. It also allows the students to hit the ground running, and allows anyone who is absolutely opposed to participation (there are very few of these) to bail out early. The key to running the first day case is to use something short (since students will have to read it on the spot), accessible, interesting, and controversial enough to spur discussion.

- Lou Ortmyer, at Davidson College in North Carolina, distributes a *Doonesbury* comic strip which deals with grade inflation.

- Mark Boyer, at the University of Connecticut, uses a short news article debating foreign ownership of US professional baseball teams.
- Many professors use “The Melian Dialogue” or “The Two Oaths of Richard Helms.”
- Or, simply pick a brief, subject-related news article on a current international issue. For example, you could use articles on the debate over French nuclear testing, on UNICEF’s dilemma whether to provide aid to children in Bosnia (perhaps being used as a pawn in the war and endangering UN personnel) or to pull out of Bosnia (leaving children in the war zone without aid).

Concentrate on getting everyone involved in this first exposure, rather than having too specific or elaborate content goals. For example, you might go around the room with the easy first question “what surprised you or struck you in reading this case?” Usually I start out by pitching softball—easier, descriptive, scene-setting—questions, and when they are more at ease and more folks are participating, move to the more high voltage or more difficult questions. If you are short on time and want to peak their interest immediately, you might dive right to the controversial point of the case, by asking “What is France’s problem?” or “What is the UNICEF director’s problem?” Emphasize that they don’t need to be an expert to answer the question—after all it’s the first day of class! All they need to participate in the discussion is the information which was contained in the case. Save high threshold questions (which require students to go out on a limb more, offering more personal judgments or prescriptions for action), for later in the discussion, after you have people participating.

Follow-up with a one-word debriefing exercise: have each student quickly give a one word description of their experience of the case discussion (for example, “intense,” “fast,” “exciting,” “intimidating”). Use this opportunity to address any questions and concerns they may raise, to underline the differences between case and traditional teaching methods, and to emphasize that, as with most things in life, though difficult at first, practice will make participation easier

Progress Through Two Learning Curves

Think about the course as two learning curves—one focused on process learning and classroom culture, the other aimed at your content goals—woven together into one tapestry. *How* you pitch the material will vary as students evolve from hesitant newcomers to active learning into more proficient practitioners. Early in the semester, with inexperienced students, you will likely ask “softball questions” to engage them in the material at a low stress level. These tend to be basic factual questions, a battery of short, closed, descriptive questions easily drawn from the case, to open the box, involve a number of students, and get the facts of the case out on the table—Who were the actors? What were their interests? What were their options? Later, you can push them to evaluate these early answers—What were the pros and cons of these options? Which actors and interests mattered most? Open-ended, no-right-answer questions—“what did you think?”—also make good “softball” openers.

You might assign pairs or small groups of students to discuss a particular topic, then report back to the class as a whole. Small group exercises can vet poor answers while boosting confidence. Splitting the class into two sides for a debate can serve the same purpose. Since there are more opportunities for a student to hide in a larger group, you must take care to ensure that voices besides the most gregarious are heard.

Role playing can also be useful earlier in the semester or class, since students represent the views of actors in the case, not their own thoughts. Role playing can be a good device to draw out more quiet students, or to acquaint more opinionated students with an opposite viewpoint.

Role Playing

Role playing can be pre-planned as the center of the case class, or may be a second pathway for discussion if your question strategy is lagging. As cases make the actors come alive, and challenge students to consider what they would do in the policy-maker's place, it is a short step to ask the student to become the person. This technique can be especially instructive if you find that the discussion has become one-sided, without much controversy. Assigning roles forces students to look at the problem through a different lens.

Avoid oversubscribing the roles; as you begin a role play, leave some actors out so you can create additional roles if needed—if students are missing a key element of the case that is well-represented by a case player.

Debriefing a role-play is important to extend it from a game to an analytical exercise. While the role-play is instrumental in getting students inside the case, they need to look back at why they portrayed a certain outcome in the simulation. Making actors' interests explicit, and perhaps comparing the student outcome to the historical outcome makes the exercise more than simply an expedient means of generating discussion.

Reward (or “validate”) participation. This can be as minimal as smiling and nodding in agreement, or repeating the student's name and point while nominating it for further discussion (“What do you think of Susan's point that . . .”). Or you can compliment the quality of a student's comment (“Luis raises an excellent point”). Students report that just having the professor write their comments on the board (or overhead transparency) is hugely validating as well.

A Teachable Moment

Sometimes a great moment comes along where we can reinforce the importance of some of these skills that students may initially acquire only grudgingly. For example, students typically resist working in groups to solve problems. On a mid-semester evaluation, a student wrote, "I do not like how I feel 'duh' after we discuss a case." When I reported the results of the overall evaluation, I commented that I wished I knew more concretely what that comment meant, since my goal was to help students feel smarter, not dumber! This brave student identified herself and explained that she thought she should be able to solve the complex issues in the cases alone; that her individual knowledge should be comprehensive enough to do this on her own. I was able to explain that one person rarely solves real world problems, rather team-work is imperative to identifying and implementing solutions. This energized students about collective learning in a powerful way, since most had been "trained" to believe they should be able to do it all on their own!

Get Real

As the students "get their sea legs," you can push them harder, asking more challenging questions, and aiming at evolution.

The "Bread Crumb" Method

Get students to bite on the first few questions and in the first few sessions with a positive result, and as they become more comfortable with each other, the method, and the material, you can get to the "red meat" of the case more quickly, allow the students to chew on it with less direction from you, and get out of the way. As the class and the semester wear on, "raise the bar" for participation, moving quickly to challenging questions (evaluative, prescriptive, analytic, judgmental and interpretive) and follow-up queries ("can you explain that?," "do the rest of you agree?," "how does that square with Waltz's theory...or Jason's point?"); spend less time and emphasis repeating or validating students' points.

"The Puzzler"

With "The Puzzler," students first generate reasons to support one policy choice, and then ask them to explain why the opposite policy was preferred. (For example, why did the Bush administration first choose not to intervene in Somalia in early 1992, but later reversed that decision.) Sometimes called the "Whipsaw," you lead students down one path, then switch directions. This is usually met with groans and laughter, and lots of appreciation later.

“The Big Bang”

When students are hitting their stride, you can begin the case discussion by directly posing a big, controversial, high voltage question—e.g., “Was Bush’s policy toward Haitian refugees racist?”—allowing student discussion to get more heated, while you step to the sidelines. For “The Big Bang” method to be effective, students have to be “primed” enough to take over the discussion, and the question has to be controversial enough to get them to bite and to generate some real heat (and light). This usually involves using questions which touch on emotional issues, both early in the semester (as a hook and as a signal of things to come), and later in the semester when students are better prepared to take the heat.

Classes and students are always different, so there is no magic method or strict timeline for advancing through the learning curve. Listen to your students, pay attention to how well they seem to be developing their communication and participation skills, and adjust your lesson plans accordingly. In emphasizing content goals, professors think a great deal about ordering the semester so that the students will encounter material in the earlier sessions which they will need to make sense of the later sessions. In participatory teaching you are doing the same thing, only you are adding a concern for process to your teaching goals. Try to make sure you prepare students early in the semester by building communication and participation skills, confidence, and a classroom culture which will give them the means to handle more challenging lesson plans as the semester advances.

The ABCs of Case Teaching

Preparing to Teach a Case

Prepare on several levels¹

- Substance—know your learning objectives for the case and how the facts and nuances of this story will help advance progress toward achieving those goals.
- Discussion Path—think of a question strategy that will generate a discussion of the points you want to cover.
- Students—know your audience—keep in mind who participates in what way and who holds what kinds of beliefs.

Learning Outcomes Goals

Without a doubt, the most important aspect of preparing to teach a case is that of thinking carefully about your learning outcome objectives for the class. If you know the answer to—WHY are you using this case at this point?—you are halfway to your goal.

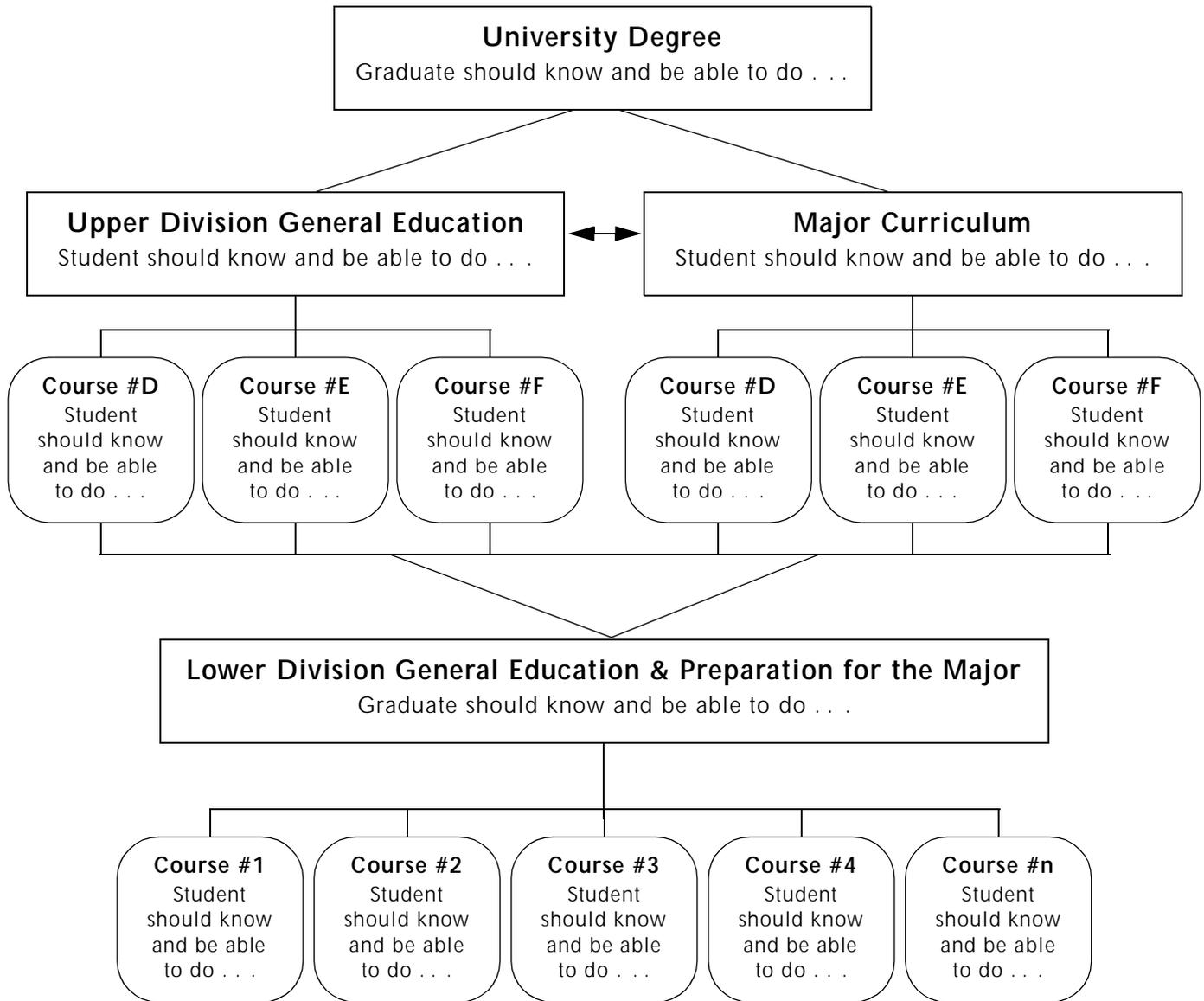
Learning outcomes typically fall into three categories -knowledge, skills, and attitudes **Knowledge** outcomes focus on disciplinary content. Every major who graduates should

- share some core knowledge base,
- be familiar with and know the parameters of key sub-fields of the discipline, and
- have had the opportunity to explore some specialty areas in depth.

Skills competencies generally include communication—writing, speaking, listening, reading; critical thinking—analysis, synthesis, problem solving, interpretation, evaluation; and such functional literacies as mathematics, computer use, statistical analysis, learning skills, resource use, and information search and acquisition.

1. Adopted from M. Lindenberg, "Participative Teaching Tips," Pew Faculty Fellowship in International Affairs Workshop (Cambridge, MA: Harvard University, Kennedy School of Government, June 1992); see also Bohrer, "Teaching International Relations with Cases," <http://www.guisd.org>, 1994b; José Gomez-Ibañez and Joseph Kalt, "Learning by the Case Method" N15-86-1136.0 (Cambridge, MA: Kennedy School of Government Case Program, 1986); J.L. Lantis, L.M. Kuzma, and J. Bohrer, eds., *Active Learning in the New International Studies Classroom* (Boulder, CO: Lynne Rienner, 2000); David H. Moister, "Preparing for Class," #9-682-014 (Boston, MA: Harvard Business School, 1981).

LEARNING OUTCOMES HIERARCHY



Attitudes measure how students feel about their chosen disciplinary curriculum and its application, about their school, and/or about their work. Attitudes also encompass student awareness of and sensitivity to different cultures, ethics, morality, their self-confidence, the value of negotiation and compromise, and so forth.²

Ideally, your departmental faculty will have worked together to identify the graduates with your major *should be able to think, know, or do*. And, ideally, these will have been informed, at least in part, by institutional mission and goals. This makes your job a little easier, as your classroom learning outcomes goals will derive from the curricular learning outcomes in your major. Realistically, your department has likely not had that conversation. If this is your situation, then you will specify these goals by yourself or in conversation with a few close colleagues. In either event, no one class session is likely to generate a lasting learning outcome; rather learning outcomes are embedded in student “psychics” by overlapping reinforcements over time. Your goal is to add substance and glue to important content, skills, and attitudes relevant to your major. In the end, your disciplinary learning outcomes should inform assessment activities.³

Cases, Data Analysis, and Computer Use

Computers can be very powerful data analysis tools. In cases with strong data exhibits, even when asked to perform pre-case exercises, students may not think to exhaust the possibilities for data manipulation. In an electronically equipped classroom, you can ask students to bring their own data worksheets to share with the group. If you discover that the class has not fully exploited the quantitative information, you can help the group puzzle this out together.

In an age where data presentation is an important component of information management, requiring data exercises as part of the pre-case preparation is a strong service to your students. Where the case has data appendices, make the students use them by requiring a minimum of one graph to accompany a written policy brief. A picture is worth a thousand words.

Increasingly, data sets are available electronically, and may be used to supplement case discussions. Class data can be placed on a public access server, where students can copy the information electronically and employ it with the cases.

Case Selection and Placement

Once you have clearly defined your learning outcomes for the course and the class session, you are ready to select a case. Typically, a single case can serve several teaching purposes so you will want to think about how you plan to sequence cases during the course term as well. Sequencing cases, for example, along a continuum of “easier-to-analyze” to “extremely complicated” would be particularly appropriate if you are teaching a group of

2. See, for example, R.M. Diamond, *Designing & Assessing Courses & Curricula: A Practical Guide* (San Francisco, CA: Jossey-Bass, 1998), p. 52; T.W. Bantu, J.P. Lund, K.E. Black, F.W. Oblander, *Assessment in Practice: Putting Principles to Work on College Campuses* (San Francisco, CA: Jossey-Bass, 1996); Banta, et al., eds., *Making a Difference: Outcomes of a Decade of Assessment in Higher Education* (San Francisco, CA: Jossey-Bass, 1993).

3. J.O. Nichols, *The Departmental Guide and Record Book for Student Outcomes Assessment and Institutional Effectiveness* (New York, NY: Agathon Press, 1995).

students early in their college careers or new to the case method. On the other hand, if you are teaching in an executive MBA program—to a group of experienced corporate decision-makers—you may want to jump in with a more complex case right away. Whatever your situation, you want “to place the case purposefully within the framework of the course,” thinking about “where it fits into the sequence of related classes and materials.”⁴

Finally, you will want to pay careful attention to whether or not the case includes some kind of an extension—such extensions vary from one or more multiple parts (B, C, or D cases) to the provision of an epilogue detailing the “real” outcome or adding “hindsight” materials not available to the real decisionmakers in “real time.”⁵ Comparing the actual outcome of the case to students' analysis is often grist for productive discussion. Why was the outcome different from what the class advocated? Frequently, this provides you a wonderful opportunity to distinguish between actual policy failure and the predictive failure of theories. Even if the case does not have a formal epilogue, you might want to present the

actual outcome to the students. Beyond the analytical benefits, it can also help to set the historical record straight.

Prepare to Punt

Case preparation should always include a punt strategy. What if your case isn't working? What if the students are suffering from “midtermitis,” “senioritis,” or just aren't willing to star that day? What if they just didn't get the point? It is useful to think about alternatives in your case plan. Changing technique or strategy during a case class might enliven discussion. If, for example, the class appears to be dragging, role playing or improvisation may energize them. If students are missing the central points of a case, don't be afraid to step outside the case with a short “lecturette.” They simply might not have the theoretical tools to process the information. You can turn that into a great pedagogical lesson. “Look,” you might tell them, “look at why your theory is important. We need these constructs to push our analysis further.” If you can't seem to get discussion going, a five minute time-out of breaking off into small groups often helps to get the mental juices flowing.

Case teaching requires flexibility.

Speaking of the Syllabus

Make your syllabus a road map. Use it to establish a learning contract with your students. Beyond simply being a reading list with dates and grade requirements, a syllabus can set the tone in terms of both the content and the process of the course. It is the students' first acquaintance with you and how you plan to organize their course. Beyond a listing of requirements articulate your learning goals for the class, and provide a series of thematic questions to link elements of the class together. Particularly in a course that integrates theory and cases, the syllabus is a forum to make explicit the connections between the text and the cases. A student, looking back or forward at any point in the course, can see through a series of questions where the course

4. Bohrer, 1995/6, p. 3; see also A. Velenchik, “The Case Method as a Strategy for Teaching Policy Analysis to Undergraduates,” *Journal of Economic Education*, Vol. 26, No. 1. (1995), pp. 29–38.

5. NOTE: When you order cases, be sure to ask your bookstore personnel to send any extensions directly to you. When students receive these parts in advance of the class, it distorts their analysis and decision-making during the discussion.

originated and where it is going. If you do not have a structure of homework assignments, present the case discussion questions in the syllabus so you do not get caught up having to hand them out during the frenzy of the semester.

Beyond the content flags, your syllabus is the place to set the tone of your class. In the syllabus you can lay out for students the objectives of case teaching. Make sure your expectations for performance are clear so your students do not have to use trial and error to figure out what you want.

Outline the ground rules of your case classroom. Use your syllabus to announce incentives for participation; to define what you mean by participation and how you will measure it. Explain if participation is limited to what happens in the class hour, or if office hour discussions will count. Explain what happens, if anything, if a student misses a case class.

The syllabus is the perfect place to invite your students to see you out of class. For example, if the size of your class permits, noting that you expect each student to come in for an informal office discussion in the first two weeks of class signals students that you really care about them as individuals. You might require or suggest a number of office hour visits throughout the semester. For the quiet students, some personal contact with the instructor does wonders for case class participation. Somehow they feel they have a basis for trust and are then willing to risk themselves intellectually.

Problem

Often my efforts to organize a course around readings and cases have led to the mismanagement of instructional time—a fancy way of saying that I run out of time in the middle of things. I’ve consistently underestimated the amount of time needed to carry out a full case discussion, while correspondingly overestimating the amount of content I can cover in a single quarter. The result is a truncated discussion, with a radical foreshortening of the crucial final phase when the class summarizes, consolidates, and reflects upon what was learned. This is the pedagogical equivalent of a joke ended before the punchline.¹

Possible fix

If a discussion gets away from you, a written wrap-up might be most productive for you and your students. With three minutes left, it may be difficult for you to touch on all the themes you want to reflect on or make all the connections to broader theoretical perspectives that you think are important. Ask your students to do this in a quick written exercise. Then, using their written words, in the next class prepare a handout that responds to some of these themes. Alternatively, if you have established an active e-mail dialogue or have space on a general access server, you can continue the discussion electronically. This turns the negative of the time warp into a positive exercise in continuing the dialogue outside the classroom.

Suggestions for long-term correction

Diagnose the problem. Have you tried to do too much or was it just a bad teaching day? What were your teaching objectives? Were they too broad or involved for your audience? If the failure was less in planning and more in execution, try to identify the crucial turning point(s) where time ran away. Would an intervention such as “this is very exciting material here—but we need to move on to another aspect of this problem” have worked? Also remember that just because you ran out of time it doesn’t mean that the class wasn’t productive. Perhaps your students took over and ran down a fruitful but different path from the one you had planned.

1. Gary Sykes, “Learning to Teach with Cases,” *Journal of Policy Analysis and Management*, 1990, 9, 2, 297–302.

The ABCs of Case Teaching

Sample Case Preparation

prepared by
MARK BOYER
Professor, Political Science, University of Connecticut

Using John Odell and David Lang, *Korean Joggers*, Pew Case Studies in International Affairs, #129-92-R (Washington, DC: Institute for the Study of Diplomacy Publications, School of Foreign Service, Georgetown University, 1988).

Let's say you are teaching a course on negotiation and bargaining or international political economy, and you've chosen the *Korean Joggers* to illustrate aspects of international trade negotiations, issues of international power differences within negotiations, and negotiation tactics. Naturally, you have carefully matched the case with your course and class learning objectives. Now you begin the work associated with theme identification and question mapping.

Theme Identification

If you based your selection on a case abstract or teaching note, you will need to read it thoroughly. As you read, think about and make notes on what you think the case's major themes are and how they relate to your learning objectives. For most class sessions of 50-75 minutes, three to five themes or major ideas suffice to ensure careful analysis and avoid superficial exploration of too many ideas. The *Korean Joggers* themes fall out as

1. tactics available to weaker states in negotiations;
2. how to create joint gains, or integrative bargaining, between negotiation partners;
3. issues affecting asymmetrical negotiations; and
4. the internal and external political pressures exerted on both parties to the negotiation.

Case details are also incredibly important. These narrative specifics provide the drama that students find interesting and will lead them collectively to the broader themes. You need to be familiar with the details to prevent students from introducing inaccurate information from the case that could lead the class in undesirable directions. Lastly, details will help you create the session map, that helps you predict the possible directions a case discussion.

Case Mapping and Approaches to Questioning

Consider how different first questions yield distinct arguments articulated by the class, eventually leading to disparate conclusions. The *Korean Joggers* yields the following partial maps:

- The two-part question, “What is the negotiating problem here? Is the problem the same for both sides,?” opens up the discussion to a broad-based exploration of the issues as perceived by both sides. This could lead to a discussion about the validity of these perceptions.
- Beginning with “What are U.S. objectives in these negotiations?,” might lead to responses ranging from the impact of domestic politics on the Carter administration, to allied relations, to the use of American economic power -each leading down a different discussion path,
- Asking “What can Korea do in the face of US demands?,” will likely move to the issue of the tactics “weaker” states might employ in a negotiating position.

Any question may lead to an unexpected discussion. Anticipating the unexpected can help you be prepared to cope during class. Of course, you cannot be prepared for all student comments, or anticipate exactly how student responses may build on one another; by mapping the potential directions of the case, you are better able to anticipate the various possible paths, and plan the sequence of questions you will use to uncover case themes. Without some kind of map, you may not see how to lead the discussion around to the relevant points. Case mapping is contingency planning for the case teacher.

Once you have drawn your individual question map—either cribbing from available teaching notes or designing your own—try to hear your own questions with your students’ ears. Will your questions make sense to them? Have you used obscure disciplinary jargon with which your students are unfamiliar? Evaluate the kind of questions you plan to ask and the time you plan to dedicate to each. Do your questions move through levels, from description to analysis to prescription? Do you need to spend more time on description perhaps it is the beginning of the semester, and the facts in the case bear careful definition? Or can you quickly move the group from getting the facts out to analyzing them? Are there exercises—pre-class written exercises or small group in-class exercises—that can jump you past the descriptive phase? What are your plans for closure? What lessons do you hope your students will take away? What is your plan if they don’t quite get there? Are you prepared to give a lecturette in summary?

Opening the Case Class

Your opening question will likely vary in style and difficulty as you move through the term. Early on you might start the *Korean* loggers by asking students to list the actors and their perceived stakes. This type of opener serves as a softball warm-up, but also lays out the fundamentals of a case in a very straightforward way. Typically, although you will start with a set of 3–5 thematically-focused discussion questions related to your teaching goals, you will ask many more questions during the case discussion. So, with a more experienced group of students working through the *Korean* Joggers, you might begin by asking, “Why are the US and Korea arguing over sneakers?,” to focus on the theme of pressures (internal and external) pushing each government to the negotiating table over a seemingly silly issue. Alternatively, asking “Is Korea the underdog in these negotiations?” targets negotiation tactics Korea is using in its struggle with a larger power.

The ABCs of Case Teaching

“Running” the Case

Questions

Asking questions is key to executing your strategy for the session.¹ Of course, your most immediate concern is to generate focused participation. This makes your first question critical. When thinking about your questions, consider this observation from Albert Einstein:

Most teachers waste their time by asking questions which are intended to discover what a pupil does *not* know, whereas the true art of questioning has for its purpose to discover what the pupil knows or is capable of knowing.²

Then use questions to move students through the five typical stages of case analysis:

- What is the situation?
- What are the possibilities for action?
- What are the consequences of each?
- What action, then, should be taken?
- What general principles and concepts seem to follow from this analysis?

Within each phase, you can use questions to help students

- obtain information;
- clarify a point;
- confirm a point;
- draw attention to related points;
- foster debate;
- resolve a debate;

1. Boehrer and Linsky 1990; C.R. Christensen, D.A. Garvin, and A. Sweet, eds., *Education for Judgment. The Artistry of Discussion Leadership* (Boston, MA: Harvard Business School Press, 1991); Christensen and A.J. Hansen, *Teaching and the Case Method: Text, Cases, and Readings* (Boston, MA: Harvard Business School Press, 1987); Derek Bok Center for Teaching and Learning, Harvard University, “The Art of Discussion Leading: A Class with Chris Christensen” (Video) 603-532-7454 (Bolton, MA: Anker Publishing Co., 1995).

2. A. Calaprice, *The Quotable Einstein* (Princeton, NJ: Princeton University Press, 1996), p. 37.

- change the direction of the discussion;
- suggest a hypothesis;
- stimulate abstract thought; and,
- begin a summation.³

| Goal | Question Type |
|--|--|
| To initiate conversation and create a comfort zone for student participation | “Softball” questions with no obvious right answers |
| To practice or define the rules for productive participation | Easy questions asking for description taken directly from the case narrative |
| To begin to generate analysis | How? Why? Wast this action appropriate? |
| To move to evaluation | Other opinions or thoughts about . . . ? |
| To encourage prediction | What would be the consequences of? |

Careful questioning allows you to keep students focused on analysis as you seek to achieve class/course learning outcomes. Questions are also good tools to help you

- emphasize that it is important to stay on a topic, or that it is time to move on to another;
- clarify previous questions—students may not answer right away because they did not understand what was being asked the first time;
- refer students to a particular exhibit in the case;
- focus attention back on the case and away from a dispute that is going nowhere;
- pay attention to and honor a good point made by a student;
- diffuse tension or conflict through humor where appropriate;
- remove a comment put on the board during a brainstorming session that students (and you!) recognize as no longer relevant or accurate; and
- push students to support their claims with empirical evidence (from the case, other class material, life experience, etc.) and/or with logic and reasoned argumentation.

3. List adopted from Lang, C., *Case Method Teaching in the Community College: A Guide for Teaching and Faculty Development* (Newton, MA: Education Development Center, Inc., 1986).

QUESTION TYPOLOGY

| Question Type | Sample Questions |
|---------------------|---|
| Open-Ended | What are your reactions to this situation? What is going-on here? |
| Diagnostic | What factors influenced the evolution of events? Why did <i>X</i> decide to <i>Y</i> ? |
| Information | Who are the actors? What are their interests/positions? How do we know? |
| Challenge | Why do you think it was appropriate (or inappropriate) for <i>X</i> to do <i>Y</i> ? What Challenge arguments run counter to that view? |
| Action | What does <i>X</i> need to do to achieve his stated goals? How else might he have handled the situation? |
| Priority/Sequence | What immediate action he should take? Should he do <i>A</i> or <i>B</i> first? |
| Prediction | What do you think is going to happen now? |
| Hypothetical | What might have been the result if <i>X</i> had done <i>Z</i> instead? |
| Extension | What assumptions underlie <i>X</i> 's behavior/actions? What are the downside risks of that approach as opposed to another? |
| Generalization | Would other experienced policymakers be likely to do the same? What skills do participants need in order to achieve their stated goals? |
| Comprehension | What led to failure here? |
| Application | How do you deal with conflict at work? Did they do the same things here? |
| Analysis/Comparison | Where else have we seen this kind of situation? How is that similar/different from what we see here? |
| Synthesis | How did prior actions affect—expand or limit—the options available here? |
| Evaluation | What is the best course of action here? |

Source: Adapted from J. Boehrer, Kennedy School of Government, Presentation for Pew Case Study Workshop for international Fellows (Cambridge, MA: Harvard University, June 1992); C.R. Christensen, "The Discussion Teacher in Action: Questioning, Listening, and Response," *Education for Judgment: The Artistry of Discussion Leadership*, C.R. Christensen, D.A. Garvin, A. Sweet, eds., (Boston, MA: Harvard Business School Press, 1991), p. 159.

Active Listening

Once the case is under way, you want to concentrate on three things: “individual comments, group thinking, and your teaching plan.”⁴ A case discussion places you in a continuing cycle of questioning, listening, and responding.

Listening is most important—without effective listening, the cycle will be stymied after the first discussion question is thrown out to the class and quickly answered. Actively listening to student comments allows you to use follow-up questions to push individual or collective thinking; you can take advantage of opportunities to highlight important points or to shift the conversation to a new direction. Learning to be alert and receptive to student comments and questions throughout a class session will help you seek clarifications when a student comment is unclear, lead students to themes and assumptions that underlie a diverse series of comments, and bring the session to a positive closure. Listening also allows you to gauge the level of preparation and understanding that exists in the class in general and in individual students. Effective listening leads logically to the responses that a teacher makes during a case discussion.

Validating Student Participation

One case teaching dilemma is the tension between validating responses and pushing students to think critically and to articulate difficult arguments. Case teaching is a collaborative enterprise: The safety of the collaborative experience encourages students to venture intellectually. Therefore, confrontational approaches could alienate students and be counter-productive; if some students appear to be intimidated, others in the class may sense that it is not safe to venture ideas or opinions. Just as building consensus can obscure a greater diversity of opinion, collective safety may come at the cost of critical thinking.

Case teaching generates complex, complicated, and even ambiguous answers; they are seldom obvious and indisputably right. Sometimes, saying something “silly” may advance the discussion as much as an apparent insight. You can validate and challenge students without sacrificing learning or taking casualties: If a student goes out on a limb, come back to the comment and note how it triggered a valuable discussion. Make sure the student feels reintegrated into the group experience. Separate the validation for participating in the process of collective discovery from the merit of the contribution’s content. This way you can signal students that venturing into the discussion—whether right or wrong—is valued. In a case class, students can get points for simply playing.

Using the Blackboard

Use the blackboard, overhead transparencies, or your computer as an assistant to record the conversation—track where you have been, direct the conversation to meet your class goals, and suggest important notes for students to record as well. Build discussion path-

4. Bohrer, 1995/6, pp. 6–8.

Avoiding the “Swap Meet”

Problem: Discussion is devolving into nothing more than an elevated swapping of opinions, leading to the tacit conclusion that one student’s view is as good as another’s or that “it all depends.”

Possible Fix: “There are a lot of good ideas here.” (Validating the participation.) “Let’s talk about what are the most important principles. How do we prioritize these ideas?” (Taking-the anarchy of ideas and asking students to sort through them.)

Suggestions for long-term correction: Look at your question strategy. Is there a progression from one type of question to another? Are you stuck at the level of creating alternatives without pushing students to the tough job of relative evaluation? If you think you are pushing but it feels as though you are pushing on a string, look (perhaps on video) at the ways you are responding to students. Are you sending the signal that, while participation is valued (and hence safe), some responses are better than others?

Source: Gary Sykes, “Learning to Teach with Cases,” *Journal of Policy Analysis and Management*, 1990, 9, 2, 297–302.

ways, organize material, validate individual student comments, log the discussion. With the blackboard, you can stop and ask students to reorganize visually the recorded thoughts, imposing a structure on what may appear to be a chaotic stream of ideas.

Use the board as a tool to hold a good thought that you are not quite ready for in the discussion: Write it in the corner and note, “We want to come back to this important idea in a few minutes.” If the discussion needs to be re-directed—maybe the discussion has lost perspective or students are rambling—you can stop and say, “Let’s see what we’ve developed here on the board . . .” If it is a real mess, ask the students to restate the board map of questions.

To let ideas bubble out rapidly and then take time to recap and reshape them, let students generate a “list” of answers or viewpoints, then go to the board and say, “Let’s try to summarize where we

are in this case. Dana, can you sum up the points your colleagues have made here? . . . Jesse, have we left anything out?” This not only allows you to get the key points in written form, but signals students that, in the course of the discussion, they need to be listening carefully to what their classmates are saying.

Strategic recording of class discussion can help students recognize that they can learn from each other, not just the “sage on the stage.”

Case Mapping

As you strategize, you might think of this as mapping out your case. Keep in mind as you do that often, even though you may begin class with the exact same question, discussions frequently follow quite disparate paths as students articulate details or express ideas in divergent sequences. In the end, your goal is likely to bring both classes to the same set of themes and conclusions. This winding road to your class goals argues for mapping a case during your teaching preparation.⁵

5. ‘See Clawson, J.G., and S.C. Frey, “Mapping Case Pedagogy,” *Organizational Behavior Teaching Review* 11 (1986), pp. 1–8, for further discussion of case mapping.

Mapping can be explicit or implicit. Formal mapping—projecting on paper the potential directions a case might take and drafting a question sequence—can be especially helpful to beginning case teachers. Detailed planning can help you create and manage, a somewhat more orderly class plan and reduces your need to think on your feet during the case discussion. Whether you map formally or not, keep in mind your questions, goals, board notes, always contemplating . . . what lessons do you want displayed at the end of the class session that are key to meeting your learning outcomes goals?

The **ABCs** of Case Teaching

Saving the Case: “Case Drag”

Problem

It is three-weeks before the end of the semester; students are complaining that they have to write more papers than humanly possible; you are preparing the case the night before and wondering why in the world you chose this long, boring case. It no longer seems to fit in with the themes of the course, and you are sure it is going to bomb.

Possible Fix

First, if you are not excited about the case, chances are your students won't be either. Fix #1 is flexibility. Don't feel compelled to tie the case to the originally conceived theme. One of the beauties of case teaching and learning is that it is not linear. Rather than trying to anchor a case to a box where you subsequently find it doesn't fit, liberate the case from what might become a deadening sequence. If a case doesn't do what you think it should, ask if there is something else the case can do for you. Fix #2 is simply to change your approach to running the case: role-play or set up an impromptu debate that might explore only one portion—the most interesting—of the case.

Suggestions for long-term correction

Pay careful attention to end-of-semester evaluations of the case. It may not have been as bad as you thought it was. And if indeed it was, well, bag it.

Sample Case Map

| Left Board | |
|---------------------|----------------|
| Stakeholders/Actors | |
| Who? | What position? |

| Center Board | | |
|--------------|------------|---------|
| Options | + Benefits | - Costs |
| | | |

| Right Board |
|-------------------|
| Current Situation |

The **ABCs** of Case Teaching

“Debriefing” The Case: Summarizing, Concluding, Assessing

To ensure that students leave class having learned the objectives you selected for the day you will need to “debrief” them. I have found that it is best to use different approaches to this final component of “running” a case. Using any one approach quickly becomes too routine to be taken seriously. The following approaches to debriefing have worked best for me.

Faculty-led Summary and Conclusion

Here you might return to your board space—or wherever you have kept track of the conversation—and highlight important points which connect specifics to general principles. At this point you can choose to move from the specific to the general, or vice versa; the point is that you want the students to see how the two types of material support and relate to each other. Since most cases, as noted earlier, are “run” inductively, you should summarize with a deductive process at least once. With this faculty-led approach, YOU will likely do most of the talking during the last 10–15 minutes of the class. This gives you the opportunity to segue into the next class session as well, explaining how this session has laid the groundwork for the next.

Student-defined Summary and Conclusion Process

This you can achieve by asking students to report out—from groups or as individuals—what they consider to be the summary and conclusion of the session. Or, you may ask them to take a few minutes and write down their thoughts. If you do the latter, since you want to be sure they get the lessons you have in mind, you should

- be sure to ask a specific question—or set of questions -designed to elicit the kind of information you seek, and
- feed back that information to them either during the next class session, or as a hand out for the next class session.

Completing the Feedback Cycle

Asking students to evaluate the usefulness of a particular case or set of cases further invests them in the case process. If students are to “own” the material, they should have

some voice in commenting on the outcome of the process. You can do a quick case evaluation immediately following each case or an end-of-the-semester evaluation.

Assessment is critical to all good teaching, and especially so for case teaching. High quality assessment connects faculty and students in a powerful way.¹ You may have noticed that this manual has embedded assessment components throughout the various stages of case teaching:

- preparation,
- participation,
- the case itself,
- the process of case teaching over the course of the semester,
- student learning outcomes, and
- whether students are learning more or less using cases.

Assessment can help students evaluate their own learning—how they learn best, what they can do to enhance their learning, what they are learning. Assessment helps faculty evaluate their teaching performance and informs course and pedagogy revisions. Assessment conducted properly—ongoing, purposeful, including appropriate feedback loops—engages students, enhances mutual accountability, and keeps student learning at the center of the enterprise.² Although too often resisted or considered only as an after-thought, effective assessment is critical to the teaching and learning process.

Effective Assessment

- Assesses what we teach and what we expect our students to learn;
- Provides information for improving learning;
- Focuses on process and well as outcomes;
- Actively involves teachers and students;
- Uses multiple and varied measures;
- Is carried out at various points;
- Provides feedback to those most affected; and
- Is an intrinsically educational activity.

Source: Angelo, TA. (1993). *Classroom Assessment/Classroom Research Workshop*. Berkeley, CA: Boston College & University of California at Berkeley, August.

1. Angelo, 1996; Angelo, TA., “Ten Easy Pieces: Assessing Higher Learning in Four Dimensions,” *New Directions for Teaching and Learning Classroom Research: Early Lessons from Success*, No. 46, (Summer 1991), pp. 17–31.

2. Thomas A. Angelo, ed., *Classroom Research: Early Lessons from Success—New Directions for Teaching and Learning*, No. 46 (San Francisco, CA: Jossey-Bass, 1991); Angelo, and K. Patricia Cross, *Classroom Assessment Techniques: A Handbook for College Teachers*, 2nd Edition, San Francisco, CA: Jossey-Bass, 1993); Cross, “New Lenses on Learning,” *About Campus* Vol. 1, No. 1 (March/April 1996), pp. 4–9; Cross, “Involvement in Teaching,” Paper presented at the Fifth Annual Faculty Development Institute, University of California, Berkeley August 11, 1993; Cross, “Classroom Research: Helping Professors Learn More About Teaching and Learning,” pp. 122–142 in Peter Seldin and Associates, *How Administrators Can Improve Teaching* (San Francisco, CA: Jossey-Bass, 1990); Gilbert J. Cuevas, “Feedback from Classroom Research Projects,” *Community/Junior College* Vol. 15 (1991), pp. 381–390; Regina Eisenbach, Renée Curry, and Vicki L. Golich, “Classroom Assessment Across the Disciplines,” *New Directions for Teaching and Learning*, No. 75. (Fall 1998), pp. 59–; Michael J. Fratantuono, “Evaluating the Case Method,” *International Studies Notes* Vol. 19, No. 2 (1994), pp. 34–44.

Feedback on Case Learning

Please reflect on your experience of discussing and learning from cases, and give the most thoughtful and complete responses you can. Your thoughts will help your instructor and other faculty use cases as effectively as possible.

1. How do you prepare for case discussions? How is your preparation similar or different for other cases?
2. What is similar and different from what is usual for you in other classes about the focus of your attention and the thought processes you engage in during case discussion?
3. How have your approach to analyzing cases or the results of your analysis changed since you have been participating in case classes?
4. How does the nature or extent of what you have learned with cases differ from what you have learned with other materials?
5. What impact, if any, has learning with cases had on your approach to other material, your experience of other kinds or classes, or your learning from them?
6. For each of the following cases, note what you most liked and disliked about the case. (List each case.)

Ideally, a case class would be in the 20 to 40 range, but then that is the ideal size for almost any teaching situation. Cases are run successfully in very large classes of over 200 quite consistently

Large Classes

Teaching large classes requires more constant attention to create and maintain a safe culture of participation, and to manage case discussions. Students seldom feel comfortable speaking in front of large numbers of anonymous peers. Usually, the classrooms force students to sit in rows, making it difficult to carry on a genuine conversation—talking to someone else's back. Shy students find participation painful in large classroom settings. Volunteers are either very brave or enjoy performing (but might not be the best analysts). Large classes place a greater burden on you to **call** on students whose hands are not up, thereby risking their embarrassment. Incentives for participation are low because students figure you will not remember who spoke anyhow.

Nevertheless, case teaching works and works well in large classes. Several tricks can decrease the threatening atmosphere of a large classroom. To facilitate the flow of discussion around the class, you can ask student X to comment on the response from student Y. In this situation, you are very much the conductor of a large orchestra, with many instrumental sections.

When possible, use the classroom space—walk up and down the aisles. This brings you closer to your students, and helps those in the back-row recognize that they must play the game as well. If moving about a large classroom makes board use difficult, consider one of these two techniques help to mitigate this problem. If you have student assistants, task one to be the class scribe and record key discussion points.

To assess participation, you could use a student assistant to record who has contributed what to the conversation. You can also ask students to self-assess, describing their participation, and, perhaps, naming the one or two peers from whom they learned the most that day. At worst, this will help you remember just who the stars of that class were.

To make an intimidating classroom feel more intimate, you can break students into small groups and give them a short exercise. Sitting in a classroom buzzing with conversation,

students often feel safer to lend their voices and report on behalf of their peers when the entire class reconvenes. It is also a great way for more than one student to share an important insight or observation, and for them to see that they can learn from each other

The **ABCs** of Case Teaching

In the End . . .

Perhaps the most important thing you can do to prepare for a case class is to relax and get ready to enjoy yourself. Case teaching is fun. It is exciting to see where students want to take material, even if it is a bit off from where you were planning. It is wonderfully invigorating to see what your students can do intellectually without your handing it to them on a lecture platter. While you may have your ups and downs with a particular case, students generally love case work. Who doesn't like to be taken seriously, to be engaged in material as if they mattered? Think about what these students do most of their days—sit still and take notes. While your cases may not always do just what you hoped, they almost never fail.

We now invite you to sit back, relax, and enjoy the excitement and thrill associated with this very powerful teaching style. This is a living document and we invite your comments critiques, additions, tips, solutions, ideas.

The **ABCs** of
Case Teaching

More Assessment Forms

Participation Evaluation

Group Communication Evaluation

Class Discussion Evaluation

Group Process Evaluation

Peer Evaluation of Panel Presentation

Peer Evaluation of Panel Member

Participation Evaluation

Name _____ Date _____

Class _____

| | Grade | Comments |
|----------|-------|----------|
| Delivery | | |
| Content | | |
| Context | | |

Group Communication Evaluation

GROUP # _____ DATE _____ TOPIC _____

GROUP TASK COMPETENCIES

| | <u>Excellent</u> | <u>Satisfactory</u> | <u>Unsatisfactor</u> |
|---|------------------|---------------------|----------------------|
| <p>1. Defines and analyzes the problem</p> <p>Appropriately defines and analyzes the problem that confronts the group.</p> | _____ | _____ | _____ |
| <p>2. Identifies criteria</p> <p>Appropriately participates in establishing group goal and identifies NScriteria for assessing the quality of the group outcome.</p> | _____ | _____ | _____ |
| <p>3. Generates solutions</p> <p>Appropriately identifies the solutions or alternatives identified by group members.</p> | _____ | _____ | _____ |
| <p>4. Evaluates solutions</p> <p>Appropriately evaluates the solutions or alternatives identified by group members.</p> | _____ | _____ | _____ |
| <p>5. Maintain task focus</p> <p>Appropriately helps the group stay on the task, issue, or agenda item the group is discussing.</p> | _____ | _____ | _____ |

GROUP RELATIONSHIP COMPETENCIES

| | | | |
|--|-------|-------|-------|
| <p>6. Manages conflict</p> <p>Appropriately manages disagreements and conflict.</p> | _____ | _____ | _____ |
| <p>7. Maintains climate</p> <p>Provides appropriate, supportive comments to other group members</p> | _____ | _____ | _____ |
| <p>8. Manages interactions</p> <p>Helps manage interaction and appropriately invites others to participate.</p> | _____ | _____ | _____ |

GENERAL CMOMENTS

Class Discussion Evaluation

Group members:

Topic:

MINIMUM REQUIREMENTS CHECKLIST

- Length (45–50 minutes)
- Sources cited aloud:

- Bibliography
- Outline
- Group process evaluation forms

| REQUIREMENTS RATING SHEET | Excellent | Very Good | Satisfactory | Needs Improvement |
|--|-----------|-----------|--------------|-------------------|
| Organization (20pts) | | | | |
| Topic explained clearly | | | | |
| Topic adequately developed | | | | |
| Ideas adequately supported | | | | |
| Main points clear | | | | |
| Coherence and unity | | | | |
| Members involvement (30 pts) | | | | |
| Equal participation | | | | |
| Continuity of ideas | | | | |
| Nonverbal support | | | | |
| Class discussion (30pts) | | | | |
| Encouraged class participation | | | | |
| Intelligently answered questions | | | | |
| Consideration of audience's needs | | | | |
| Delivery (10 pts) | | | | |
| Eye contact | | | | |
| Notes handled well | | | | |
| Outline & Bibliography (10 pts) | | | | |
| Detailed outline | | | | |
| Accurate bibliography | | | | |

Peer Evaluation of Panel Presentation

Group # _____ Date _____

Topic _____

Rate the group on each of the statements below using this scale:

5 = excellent; 4=good; 3 = average; 2 = below average; 1 = poor

| | |
|---|---|
| <p>Approached topic in thought-provoking way</p> <p style="text-align: right;">_____</p> | <p>Presented material in clear, interesting way</p> <p style="text-align: right;">_____</p> |
| <p>Began the presentation with an opening statement that gained my attention</p> <p style="text-align: right;">_____</p> | <p>Supported each panelist's points with interesting, relevant supporting materials (e.g., examples, statistics, quotes, visual aids)</p> <p style="text-align: right;">_____</p> |
| <p>Introduced the panel in a way that gave me a good reason to want to keep listening</p> <p style="text-align: right;">_____</p> | <p>Was organized and easy to follow</p> <p style="text-align: right;">_____</p> |
| <p>Clearly stated and achieved a purpose</p> <p style="text-align: right;">_____</p> | <p>Ended with a clear and logical summary</p> <p style="text-align: right;">_____</p> |
| <p>Clearly indicated each main point of the presentation</p> <p style="text-align: right;">_____</p> | <p>Tried to involve the audience in the presentation</p> <p style="text-align: right;">_____</p> |

Comments: Write a reaction to this panel, noting at least two things you found especially effective and at least one aspect of the panel which could have been handled more effectively. suggest how the panel might have improved the aspect of the presentation you identify as a weakness.

THIS PART OF THE FORM WILL BE DETACHED BEFORE GIVEN TO THE PANEL

Evaluator's Name:

Peer Evaluation of Panel Member

Group # _____

Topic _____

Name of group member you are evaluating _____

Rate the group on each of the statements below using this scale:

5 = excellent; 4=good; 3 = average; 2 = below average; 1 = poor

BE HONEST! AND KEEP YOUR SCORES CONFIDENTIAL!

1. The **amount and quality of contribution to research.** _____
 2. The **frequency of contribution** in group meetings. _____
 3. The ability to do expected **work ON TIME!** _____
 4. The overall **responsibility** displayed. _____
 5. The **interest** shown in making the group's presentation a success. _____
 6. The **cooperation** toward others in the group. _____
- Total score (out of 30) _____

Comments: Briefly explain the basis for your evaluation.

THIS PART OF THE FORM WILL BE DETACHED BEFORE GIVEN TO THE PANEL

Evaluator's Name:

Political Science 460

GLOBAL MONEY & POWER

PROFESSOR V.L. GOLICH
California State University, San Marcos

Course Description

Global Money and Power (GMP), more commonly referred to as International Political Economy (IPE) or Global Political Economy (GPE), introduces students to the connections between politics and economics in markets around the world. The study of Global Money and Power examines the ways in which these ostensibly distinct markets are inextricably linked—both directly and indirectly—in a sometimes chaotic and sometimes systematic web of political and economic relationships. GMP analyzes how politics influences market behavior and vice versa. Various GPE components—Production-Consumption, Security, Trade, Money, Investment, Development, and Knowledge Diffusion—are linked into a single, comprehensible, and comprehensive whole. The course is cumulative; what is examined early in the semester lays the foundation for content introduced later.

Course Goals & Teaching Philosophy

This course has both instrumental and transformative learning goals:

- to clarify issues and operations of the global political economy, so you can
 - ◆ make more informed decisions about personal and public financial issues, and
 - ◆ comprehend the gravity of policy decisions which target political and/or economic goals;
- to provoke recognition of ambiguity and complexity inherent in the GPE, so you can

- ◆ distinguish between what is feasible—politically, economically, socially—and what is rhetoric, and
- ◆ be patient with results and tolerant (if not supportive) of the need for diverse policy approaches for different target groups even if the same goal is sought;
- to increase your ability to articulate your argument effectively by improving your ability *and* willingness
 - ◆ to speak your mind,
 - ◆ to write well,
 - ◆ to think critically, and
 - ◆ to build your argument on the foundation of logical reasoning and empirical evidence.

You will have succeeded if you are able to make connections between seemingly unrelated materials you had previously not perceived *and* you are able to explain some of these connections to others.

Required Reading Material

Available for Purchase at the CSU Bookstore

1. Spero, Joan Edelman and Jeffrey A. Hart, *Politics of International Economic Relations* 5th Edition (New York, NY: St. Martin's Press, 1996)—[ISBN: 0312084765].
2. Golich, Vicki, *International Political Economy Reading Package* (San Diego, CA: Aztec Book Shops, 1999).

Available on the World Wide Web

3. Golich, Vicki, The Money Module @ URL:

http://www.csusm.edu/cwis/A_S/resources/money-module/money_mod.html

In addition, it is important to be aware of the changes occurring in political-economic issues. You are, therefore, urged to read such dailies as *The Wall Street Journal*, *The New York Times*, *The Los Angeles Times*, *The Washington Post*, *The London Times*, *The Financial Times* (London) and/or weeklies, such as *Business Week* and *The Economist*. Also useful are the quarterly journals *International Organization*, *Foreign Affairs*, *Foreign Policy*, and *International Affairs* (London).

Requirements

Learning is the result of a team effort. YOU, the student, are responsible for completing all of the readings when they are due; lectures and discussions will presume a familiarity with the assigned materials. Attendance at, preparation for, and active participation in all class

meetings is critical. “The job of a professor is to increase the level of agony about complex issues, so for students, the only way out is to think” (Fred Friendly).¹

Grades in the course will be based three components:

1. One take-home final exam (20% of your grade) designed to determine your ability to integrate and analyze the basic “facts,” issues, and concepts introduced in class

FINAL - Wednesday, May 28 - Due at NOON.

2. Preparation for and participation in six (6) case studies (60% of your grade):

Case #1 - “Hunger in the Sudan,” February 22–24

Case, #2 - “The U.S.-Japanese FSX Fighter Agreement,” March 10

Case #3 - “The IMF Structural Adjustment Program,” March 24

Case #4 - “Who Should Own What?,” April 21

Case #5 - “Development Strategies in Conflict,” May 3

Case #6 - “Exporting American Culture,” May 12

To help you prepare for and to focus our discussion, you will write a three-to-six (3–6) page analytical brief answering two study questions due at the *beginnin* of our discussion.

Please note: You are expected to be prepared for and to participate in *all* six cases. You must write a brief for only four—that’s 4—(each case study brief will be worth 15%). Answers must be typed!!!

3. Class participation (20% of your grade): YOUR participation is essential to YOUR learning. Do not underestimate the importance of this part of your grade!!! Participation means you have completed all required readings and are prepared to participate in a serious conversation about the readings.

1. Fred W. Friendly was a broadcast journalist who teamed with Edward R. Murrow to create the highly acclaimed “See It Now” series—a precursor to Public Broadcasting Series programming—and later resigned as CBS News president to protest what he saw as the commercialism of television news. He died March 5, 1998 at the age of 82.

Please note:

There will be no alternative times for exams and no make-up exams without documented major medical or emergency family excuses!! AND cases are only run on the days noted; they cannot be made up!!!

Any evidence of cheating (including plagiarism—presenting the words or ideas of others as your own) will result in a failing grade for that assignment and possibly a failing grade for the course. If you have any questions about what exactly constitutes plagiarism, please ASK them NOW!!!

Reading and Lecture Schedule

February

- 1 Syllabus Review & Introduction: What is the GPE? And how did we get the one we got? What are some of the more enduring dilemmas we confront?
Read: Spero & Hart, pp. 1–7; Gilpin, “Economic Interdependence & National Security . . .” – pkt.
- 3–10 The Production Consumption System: The symbiotic relationship between production and consumption in a world of finite resources is examined in the context of common property/public goods; the latter are defined and related to current global issues.
Read: Hardin, “The Tragedy of the Commons” – pkt.
- 15–17 Golich @ International Studies Association Conference (ISA) in Washington, D.C.
Read: “Hunger in the Sudan” – pkt.
- 22–24 Case #1: “Hunger in the Sudan”
Read: “Hunger in the Sudan”

March

- 1–8 The Security System: What is security? What are the political-economic trade-offs associated with security? How effective are economic sanctions in achieving security policy goals? What hierarchy of “high/low” politics?
Read: Spero & Hart, pp. 270–515.
- 10 Case #2: “The U.S.-Japanese FSX Fighter Agreement”
Read: “The U.S.-Japanese FSX Fighter Agreement”

- 15–22 The Monetary System—The World Economy’s “Life Blood:” What is money? Can money be managed globally? How? By whom? How do we know what money is worth? Why do crises such as that in South East Asia occur? What can/should be done about it?
Read: Spero & Hart, pp. 8–48 & 167–214; Golich, *The Money Module*
- 24 Case #3: “The IMF Structural Adjustment Program”
Read: “The IMF Structural Adjustment Program”

April

- 5–12 The Trade System—“Meat and Potatoes” What are the trade-offs between free trade and protectionism? Is trade an engine of growth for all states? What are the causes and consequences of regional trading blocs?
Read: Spero & Hart, pp. 49–95
- 14–19 Global Transformations—International Investment: What are the structures of international investment and what are the costs and benefits for host and home state of each? What are the trade-offs for a developing country wishing to encourage foreign investment within its borders?
Read: Spero & Hart, pp. 90–148 & 516–564
- 21 Case #4: “Who Should Own What?”
Read: “Who Should Own What?”
- 26–28 Development Strategies: Is aid to developing countries charity, guilt money, or a solution to poverty which could undermine the world political economy? What is the NIEO—its roots, its continuing motivation, to evolution in the 1990s?
Read: Spero & Hart, pp. 149–166 & 215–275

May

- 3 Case #6: “Development Strategies in Conflict”
Read: “Development Strategies in Conflict”
- 5–10 Communication and Knowledge—The New Information Society: Is our global economy transitioning into a post-industrial society dependent more than ever on the manipulation of knowledge? Is knowledge. power? What are the ramifications regarding who controls access to and distribution of knowledge and information?
Read: Spero & Hart, pp. 365–370; Foster, “The US Telecommunications Industry In 1996” – pkt.
- 12 Case #6: “Exporting American Culture”
Read: “Exporting American Culture”
- 17–19 Concluding Commentary

Political Science 460

Case Study Study Questions

Case #1 – Hunger in the Sudan

1. What are the causes of the hunger problem in the Sudan?
2. What role has the government agricultural strategy played?
3. Who are the primary stakeholders? Briefly describe the problem from the perspective of each and specify a plan of action.
4. What is the role of food aid in the international food system?

Case #2 – The U.S.-Japanese FSX Fighter Agreement

1. What are the parameters of the proposed U.S.-Japanese FSX Fighter Agreement? Who is slated to participate?
2. What are the costs and benefits of the proposal? And for whom?
3. What are the goals of the various actors involved here?
4. What alternative policies might you think about employing?

Case #3 – The IMF Structural Adjustment Program for Zambia's Agricultural Sector

1. What are IMF SAPs and why are they controversial?
2. What went wrong, if anything, with the IMF SAP for Zambia? How could the negative effects been averted? (Alternatively, how could the positive effects been enhanced?)
3. What is the appropriate role for the Zambian government in this case?
4. What lessons learned here might apply to recent events and IMF recommendations for the financial crises in South East Asia?

Case #4 – Who Should Own What? Choosing a Public Sector in a Newly Capitalist State

1. Why did the Hungarian government divest the SPA of its responsibility for managing long-term state assets?
2. Analyze the role played by foreign investment in Hungary's effort to liberalize its economy
3. What does the August 28, 1992 decree, which lists enterprises to remain fully or partly state-owned, reveal about the objectives and priorities of the Hungarian government?

4. Identify the steps taken by the Hungarian government to embed its privatization strategy with an appropriate set of economic policies. Analyze the social, economic, and political consequences of this approach.

*Case #5 – Development Strategies in Conflict:
Brazil and the Future of the Amazon*

1. Who are the stakeholders in this case? What positions do they hold, and what arguments do they make in support of their positions?
2. How have national and regional governmental policies contributed to the deforestation of Amazonia? How does Nossa, Natureza, hope to redress this situation?
3. Who should be involved in the decisionmaking about Amazonia? Is there a place for a moral claim to be made?
4. Should the Amazon be considered an international public good? What are (would be) the consequences of such a pronouncement?

Case #6 – Exporting American Culture

1. What issues are raised by this case? Why are they important to consider?
2. What solutions would you recommend? Remember they must be politically, economically and technologically feasible.
3. What lessons can be derived for future governance of similar issues from this case?
4. What global actors should be involved in the problem solving associated with the issues raised by this case? Justify your response.

TO BE ADDED

Background Knowledge Probe

Pre- Self-confidence Surve

Mid-Semester Feedback Form

The **ABCs** of Case Teaching

Resources

Carnegie Council on Ethics & International Affairs

170 East 64th Street
New York, NY 10021

(V) 212-838-4120

Case Research Journal

North American Case Research Association
Ray J. Stephens, Editor
1775 College Road
Columbus, OH 43210

Case Program

John F. Kennedy School of Government
Harvard University
79 JFK Street
Cambridge, MA 02138

(V) 617-495-9523

(F) 617-495-8878

<http://www.ksgcase.harvard.edu/>

Harvard Business School
Publishing Division
60 Harvard Way 230-5
Boston, MA 02163

(V) 800-545-7685

(V) 617-495-6117

(F) 617-495-6985

<http://www.hbsp.harvard.edu>

Pew Case Study Center

Institute for the Study of Diplomacy
School of Foreign Service
Georgetown University
Washington, D.C. 20057-1025

(V) 202-965-5735

(F) 202-965-5811

<http://www.guisd.org/>

Pew Case Studies in International Affairs are offered through the Institute for the Study of Diplomacy (ISD). The ISD web site provides a listing of case abstracts. The Faculty Club contains references and resources on the case method, with *The ABCs of Case Teaching* being the most prominent example.

Pew Curriculum Center for Health Policy and Management

Harvard School of Public Health
677 Huntington Avenue
Boston, MA 02115

<http://csf.colorado.edu/CaseNet/>

CaseNet is a World Wide Web site for teachers interested in using cases in International Affairs. Sponsored by the Active Learning in International Affairs Section (ALIAS) of the International Studies Association, CaseNet participants include faculty who are experienced, or simply interested in teaching international affairs with cases and other active learning approaches.

Case Study Collection

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| Ms. Anuja Adhar | (V) 202-473-6623 |
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| 1818 H Street, N.W | e-mail: aadhar@worldbank.org |
| Washington, D.C. 20433 | |

<http://www.worldbank.org/html/edi/cases/caseindex.html>

The case studies listed in this collection have been developed by the Economic Development Institute (EDI) of the World Bank, or selected for use in its various training activities. The cases deal mainly with development matters that are relevant to EDI programs and are listed here in the following categories.

<http://www.hallway.org/>

Electronic Hallway network is an online teaching resource on the case method. The Electronic Hallway encourages development of relevant courses, supports effective teaching, and enhances student learning by giving access to a wide range of case teaching materials.

INSEAD Cases

(The European Institute of Business Administration) Fontainebleau, France

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| The European Case Clearing House | (V) 01-234-750-903 |
| Cranfield Institute of Technology | (F) 01-234-751-125 |
| Cranfield | |
| Bedford MK 43 OAL | |
| England | |

<http://www.insead.fr>

| | |
|------------------------|------------------|
| ECCH at Babson College | (V) 617-239-5884 |
| Babson College | (F) 617-239-5885 |
| Babson Park | |
| Wellesley MA 02157 | |

<http://www.cranfield.ac.uk/ecch/>

Stanford Business School

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|-----------------------------|------------------|
| Case Services | (V) 650-723-2835 |
| Graduate School of Business | (F) 650-723-3989 |
| Stanford University | |
| Stanford, CA 94305-5015 | |

<http://www.gsb.stanford.edu/research/paper/cases/cases.htm>

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