The Case Study

DON'T!

What Not to Do in Teaching Cases

Clyde Freeman Herreid

"Don't" was one of the first words we ever learned at (or over) our mother's knee. It stands right up there next to "No" as our first brush with negative advice in the parental lexicon. Close behind are admonishments of "can't," "shouldn't," and "never do that again."

With this historical baggage, I am a bit hesitant to write a column entitled "Don't," knowing that its use, like an odor in a Proust novel, may trigger memories of youthful indiscretions. Furthermore, I am reminded that saying "don't" had little effect on my own children.

Yet, some of us never tire of giving advice. Ann Landers, Dr. Ruth, and I are forever urging our readers to eat your spinach, clean up your room, and don't let the dog lick your face.

So be warned, I am about to unleash a baker's dozen of "don'ts" for aspiring case teachers willing to try running a classroom discussion armed with only a couple of pages of a story and a lot of chutzpah. I am fortified with the knowledge that by saying "don't" to you, I will not only be joining your saintly mother but a long line of "don't-sayers." Here are a few famous don'ts from the pages of history.

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- "Don't fire until you see the whites of their eyes." William Prescott at Bunker Hill, 1775. (Perhaps good advice for teachers as well as soldiers.)
- "Don't give up the ship." James Lawrence on board the U.S. Frigate ***Chesapeake***, 1813. (Another chary quote relevant to teaching.)
- "Don't look back. Something may be gaining on you." Satchel Paige in his autobiography. (Baseball and teaching have a lot in common.)

Having prepared you with these historical anecdotes, I hope you will be considerate of my attempts at sharing some cautionary thoughts. So, to set the scene, picture yourself teaching tomorrow's class completely by discussion. What should and shouldn't you do, assuming, of course, you are ready for a great teaching adventure.

Donít fail to prepare.

Some teachers never adequately prepare. This is a recipe for disaster in all teaching. Unfortunately, the problem for new case teachers is often that they don't know what kind of preparation to do. They don't have a clear understanding of their objectives for using the case. They don't know how to ask the right questions. They don't come into the classroom with a planned board outline or a way to connect the major issues together. And they won't have prepared the students or themselves for this major break from the traditional lecture format. They are under the illusion that a good discussion will just happen. (Boy, are they in for a surprise.)

Donít start a discussion with a close-ended question.

The first question that the teacher asks is crucial. The primary criterion is to get students to talk, preferably thoughtfully. If you start with a question that is too obtuse, too formidable, or looks like a trick question, no one will answer. But there is another way to start off on the wrong foot. It is by asking a question that has a definite answer, such as, "What is the chemical formula of glucose?" Most students will be afraid of answering this even if they think they know it. They don't want to risk failure, so they busily put their heads down, avoid eye contact, and write furiously in their notebooks. Moreover, when some brave soul does venture an answer, where does this put you in a discussion?

The best opening questions are

open-ended, where there are multiple reasonable answers, or where the question is neutral and simple to answer. Let's say that the case is about the genetic engineering of crops and the scene is at a dinner table where a family argument is in full swing (see "Torn at the Genes" at ***http://ublib.buffalo.edu/libraries/projects/cases/ubcase.htm***). Now, a non-threatening beginning might be to ask the students to identify the family members and indicate what their positions on the topic seem to be. Another, riskier but sexier beginning would be to ask, "Should Marsha eat the tomato?"

A poor question might be, "How do scientists transfer genes from one organism to another." I would hate to answer a question like that at eight o'clock in the morning and so would the students.

Donít deal with controversial emotional material until you have analyzed the facts.

The safest way to discuss a case is to be sure that everyone has a clear understanding of the facts. If students are confused on these, it will be rough sledding ahead. It is best to get all the facts straight at the outset. For instance, in the transgenic crop story, by getting the names of all of the participants and their positions established, the teacher can then turn to the question of, "What is the evidence the protagonists have for their beliefs?" Here's where you'll get the facts out. This eventually will lead to a discussion of, "Is genetic engineering in the best interests of the people in the world?" If you start off with a question like this, however, there is a good chance that the facts will get lost in the barrage of attacks and counterattacks that ensue. Even the provocative question, "Should Marsha eat the tomato?" is perilous, and you have to have great skill as a discussion leader to uncover the facts underpinning the case before Marsha languishes in a hail of invective.

If I haven't convinced you yet, consider this problem: Suppose you are discussing the Tuskegee syphilis study on black patients in Alabama who were not informed that treatment was available. Suppose, further, that you have a racially mixed class. Now what would your first question be? (To find out what I would suggest, see ***http://ublib.buffalo.edu/libraries/projects/cases/blood_notes.html***)

Donít forget to use the blackboard in an organized way.

Students always want to know, "What is going to be on the test?" This is especially thorny in a discussion course. One solution to the problem is not to give tests, but to grade solely on the quality of their discussion. (Oh boy, let's save this one 'til another day.)

If you do give tests, your use of the blackboard will help save the day. Before you go into class, develop a blackboard plan. Decide how to organize the case. One common strategy is to write the facts of the case on the left side of the board as they emerge in the discussion. In the center of the board you might group the major issues of the case as they are analyzed. Finally, if you are dealing with a dilemma case where the protagonists have to make a decision, their possible choices and consequences could be enumerated on the right side of the board.

What you and your students get out of this exercise is that there is a sense of order to the case—and you have visible evidence that you have accomplished something. Additionally, it gives the inveterate note-takers in the class something to take home and study for the exam.

Donít expect to have a great discussion until the students know one another.

It isn't tough to get adults to speak, especially faculty who make it their business; students are another matter. Getting them to engage on scientific questions isn't a cakewalk. Part of the problem is that they know you are evaluating them. So are their peers. No one wants to look stupid. You have to make the classroom safe for their conversations. This doesn't happen right away. People have to get to know each other and develop a certain level of trust.

One essential aid is to find out their names and use them! On the first day of class I have students wear name tags, or I have them prepare small signs that they prop up in front of them if they are at a table. Faculty in business or law school where there may be 70 students frequently use a seating chart.

It is not enough to have their names; you must use them on every possible occasion. It won't be long before everyone in the room knows everyone else's name and this will greatly facilitate discussion. Still, it often takes one-third of a semester before things really get good.

Donít forget to call on different people.

How easy it is to call on the eager student who is always waving his hand, especially if he usually has good things to say. "Take not the easy path," says Yoda, our ***Star Wars*** guru.

I think it is essential to try to get everyone into the act, to get diversity into the discussion. One way is to simply keep your eyes open and watch student body language: are they leaning forward, nodding their head, frowning, opening their mouths as if beginning to speak? We all have these so-called "intention movements" when we have something to say. Watch for these clues and call on these people.

Another way is to encourage students to look at the problem from another perspective, using questions such as, "Jessica, what do you think of this proposal? What might someone say who opposed this plan?" I try to steer clear of calling on the same person repeatedly, especially one who wants to dominate the discussion. In fact, I may have to say something to him outside of class if it is a serious problem.

Donít forget to listen to the students and respond to them.

Speaking and listening are social arts—they go together. Philosopher Mortimer Adler makes the analogy that, "The catcher behind the plate is just as active a baseball player as the pitcher on the mound." Good discussion requires the participants play both positions well. They should do more than simply wait their turn to speak; they need to connect their ideas with the ones that have gone before.

For the teacher, it means that he

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should periodically try to paraphrase students' points saying, "John, do I understand correctly. . . " The teacher should not make the discussion a glorified quiz show where he runs through a series of questions, saying "right" or "wrong." Nor is this discussion a lecture in disguise. The moderator must connect one student's ideas with another. He should ask John how his ideas square with Claudia's earlier point. To do this he must listen.

The instructor should operate at several levels during the discussion. At the first level he must be aware of the case material and how to get the content out. At the second level he must be aware of the process; thinking about whom to call on next to spread the discussion about; how to resolve the conflict that has just exploded; how to stop the private conversation in the corner; how to move to engage the bored student sitting to his right; when to shift tempo.

And on the third level he is thinking of the bigger picture, how these people are doing in the course and how this case fits into the overall curriculum. He will be thinking how asking a particular question might affect a particular student; how to be encouraging to Jennifer and yet skeptical of Philip; and how this will impact on their personal development. To be successful at all of these levels requires careful listening both inside and outside of class.

Donít leave the seats in a row.

Today's classrooms are seldom arranged for good case teaching. They are designed for the lecture method, often in fixed-seat amphitheaters. Business and law schools still run cases in such settings but these would challenge Socrates himself.

Ideally, a U- or horseshoe-shaped seating arrangement works best. The open part of the U should face the blackboard. This permits the professor to walk into the U with the blackboard at his back and the students at his front and sides. This arrangement permits all of the students to see one another. This array must be modified, however, if the number of students is much more than 20. A solution is to have a second and third row of students behind the first.

Donít stand in one place in the classroom; move about.

It is almost unnecessary to make this point to a case teacher. It is hard to stand still. You have to write on the board. You have to move forward to listen seriously to a speaker or move to the side to let students engage one another. There should be no lectern to hide behind. You gotta move.

Also, consider this: you don't always have to be in the center of the horseshoe. You can move out of the U altogether and go behind the students so that you are looking over the backs of students on one side and into the faces of those on the other side. This technique works well when the students are talking to each other and you simply want to get out of the way.

Donít fret if the discussion isnít enthralling.

It takes time to get good at anything. This goes for case teaching. The students need practice and so do you. Trust me, you'll get better.

Here is an important point: instructors often believe that the easiest way to break into case teaching is to try one each semester. This appears to be a sensible approach and the students will undoubtedly enjoy it. Nonetheless, they probably will not consider the case anything more than a diversion if it is used this way—certainly not something that they should remember for the exam. No, the only way that you will have cases taken seriously and to get that enthralling discussion is to run several cases during the semester; then everyone will be comfortable with the method.

Donít expect to have a great discussion in a 50-minute period.

It takes time for students to settle down and focus. It takes time for announcements and assignments. By the time that these things have been attended to there simply isn't enough time left out of a 50-minute class to get into a subject deeply. Everyone, and especially you the instructor, will feel frustrated. To do it right requires at least 90 minutes. Two hours is better.

Donít just have students discuss things, have them produce a product.

Discussions can often leave students and instructors with an unsatisfied feeling. Both may wonder what they really did accomplish. Board work isn't always enough. Giving the students a follow-up assignment usually does the trick. Have them write up a summary of the case, write a letter to their congressman, or develop a strategic plan. These are all good homework exercises. You don't have to have each student hand in a paper for each case. They might write up something for say half or a third of the cases. This approach makes the workload more manageable for everyone.

There you have a dozen "don'ts" for your consideration. They aren't all there is to the case method, of course. There are a bunch of "do's" as well. But the "don'ts" are enough for the moment. This brings you to the point where you should be ready to take the plunge into case teaching. Caution is needed, yes, but only so much can be done ahead of time. It is necessary to get some field experience as this anonymous rhyme highlights:

> Mother may I go out to swim?
> Yes, my darling daughter.
> Hang your clothes on a hickory limb
> And don't go near the water.

Enough caution. Aspiring swimmers and case teachers have to dive in sometime. Make it soon, but just remember a final "don't":

Donít blame me if everything isnít perfect and you donít get promoted. Life isnít always fair.