

Twixt Fact and Fiction

A Case Writer's Dilemma

Clyde Freeman Herreid

What shall it be, a real case connected to the real world with blood, sweat, and tears or a fantasy, a twice-told tale by a spinner of yarns around a campfire on a summer night? When a teacher sits down to write a case, he is lured by the former and charmed by the latter. What to do: Write a case about actual events or fabricate a story to fit the occasion? This is a perennial question that many nascent case writers ask as they face the intimidating task of planning their first case.

For starters, think about this: What do we remember longer, the tale of Snow White or a news story about a child who has run away? *Star Wars* or the actual moon landing? Which character do we remember best: Sherlock Holmes or J. Edgar Hoover? There clearly is a place in our hearts for Dorothy of the *Wizard of Oz*, Harry Potter, Ali Baba, and Babar. But let's not get carried away by the fictional heroes and villains, the supermen and Draculas, before we hear from the side of the argument peopled by Mozart, Madame Curie, and Abraham Lincoln.

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Let's hear it for reality! Students *do* like real cases, especially if they involve celebrities. Cases that have a connection to their world and its events are grabbers. But it is not enough for a case to be about actual events. Some things are simply more fascinating than others, even in research. "All things being equal," study whales before you study sunfish; study gorillas before you study shore crabs. Whales are simply more "sexy" than sunfish, and gorillas have it all over shore crabs. If you had a choice, which seminar would you go to: "The evolution of whales" or "The evolution of sunfish?" Or how about "Gorillas in the Mist" versus "Shore Crabs in the Mist?" No contest here. Whales and gorillas win hands down. The same is true about dinosaurs, pandas, elephants, and Madonna. Sand flies in Uganda can't compete. So if you have a choice, choose Madonna over sand flies.

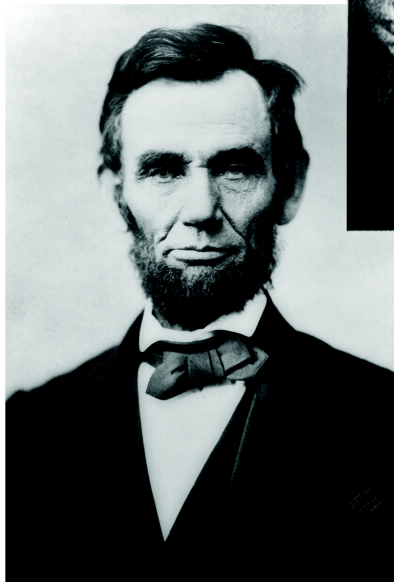
But wait: there are some problems with real cases. One is the problem of liability. If you use a person's real story, you may have real legal problems—or moral ones. There probably won't be any difficulty if you use a true story of a public figure whose story has been splashed across the newspapers of the world and on CNN. You are especially safe if you paraphrase quotations taken from the press as part of your story line. But even here you must be careful; the print media may have copyright issues at stake.

Most cases that are used in business schools are based on fact. Harvard

and Western Ontario University have thousands of such *real* cases. How do they get away with it? How can they use cases that involve real people, real companies with real documents? Answer: very carefully. They do innumerable interviews and review countless documents to get the story right. But—here is the important part—they first get permission to do all of these things; then they get everyone to sign off on the accuracy of their case. It's not just the accuracy that is involved; the case must be written in such a way that the folks in the case are not going to look like they are nincompoops. If I were a CEO, I certainly wouldn't approve of a case about my company that makes anyone look bad, no matter how truthful it was.

All of this takes time—lots of it, months or years. This means money—lots of it. No wonder that these cases cost money to use. Those of us in the science case writing business are not usually faced with such choices. Most science teachers don't know what cases are much less how to use them in their classes, and they are a far cry from writing one themselves.

Back to the reality issue. There *are* real stories to be told that seem perfect for a case study: Chernobyl, Three Mile Island, the Valdez oil spill, global warming, cold fusion, and ozone depletion. What about these? These are part of the public record. Why not use them? The answer is, of course you should.



Students like cases based on the stories of real people, such as Mozart, Marie Curie, and Abraham Lincoln.



Library of Congress

Fictionalizing a true story

Most faculty know some good stories about science. Some involve famous individuals, perhaps the race between Watson and Crick and Linus Pauling to decipher the structure of DNA; tennis pro Arthur Ashe contracting AIDS through a blood transfusion; Janet Reno and Michael J. Fox and Parkinson's disease; cyclist Lance Armstrong and testicular cancer. All are perfect stories. There should be no problem in using them. The details of their tales are well known and in the public record. As long as you don't infringe on someone's copyrighted story or commit libel, you are on safe ground.

But what about that heart-rending true story you know of child abuse, or one about degenerative spinal disease, or of a folic acid deficiency during pregnancy that happened to a friend down the street. Then what? You can try to get permission to tell their tale. But this may be at best awkward. There is another option: fictionalize the story. Change the names, the setting, and the genders. Such changes aren't always reasonable, of course. If it is a tale about

the Eiffel Tower it has to be Paris, not San Francisco. If it is about pregnancy, a gender change won't work.

Let's assume you are going to change things. How much change is enough to avoid libel or embarrassing your loved ones? This is the same problem that faces any writer of fiction. Authors don't always make the right choices and do get caught. The best dictum is change as much as possible: Give your characters cigars to chew upon, chiffon dresses, and Southern accents. Yet remember the other side of the equation. How much can you change your characters before the storyline itself becomes less engaging or less powerful? A case about an unwed mother considering abortion is hardly the same if we

make her unemployed with three children by different men versus making her a 40-year-old married woman who is a CEO of a Fortune 500 company.

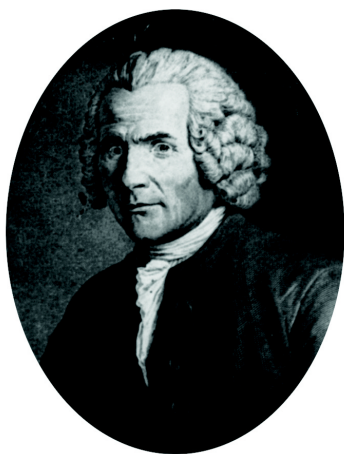
Generic cases

The more we change the protagonists, the more we slide along the slope of making it a generic case. Yes, we have avoided the libel questions, but we are now in danger of making our case so bland and uninteresting that the readers become alert to the fact that this just isn't real. It is a classroom exercise. It is just another puzzle that the instructor has posed. This is the problem with most medical cases. They start out in the most awful way I can imagine:

"A twenty-year-old female presented the following symptoms ..." When I see this kind of opening, I think: "Who in the world cares?" Even if it is based on a real case, there is no personality here. What is her name? Does she have a dog, a husband, and a child? What kind of a person is she? What will happen to those around her if she dies of this dreaded disease? I know that the formal language and the gutting of the particulars from the case allow the physician to concentrate on the physical ailments, which are, after all, his prime concern. But frankly, that is one of the troubles that I see in the whole medical profession itself. They are often focused on the "plumbing problems" and not the person.

Naming names

Using names in cases is important. We need them if we are going to care about the people. Their absence in medical cases weakens the emotional power of the story enormously. So, be sure that your characters have names. Real ones. Do not be cute with the names of your characters, especially if the subject matter is serious. Do not name a pilot Bill Flyboy or a woman with breast cancer Mary Hurtchest. This kind of "creativity" doesn't belong in cases if you want people to believe in the characters. More importantly, it undermines the seriousness of the issues you are discussing. It trivializes important issues. Don't do it.



Pure fantasy

I believe there is a place for fantasy in case writing. I have used it myself. I recently wrote a genetics case using the story of Peter Rabbit and his siblings, Flopsy, Mopsy, and Cottontail. I know of a veterinarian who wrote a cardiovascular case from the viewpoint of a pet beagle. I can remember *Reader's Digest* articles written from the viewpoint of Joe's heart, and I have coauthored a case

The world of reality has its limits; the world of imagination is boundless. Not being able to enlarge the one, let us contract the other; for it is from their difference alone that all the evils arise which render us really unhappy.

— Jean-Jacques Rousseau

that was written from the viewpoint of a human fetus. There is nothing wrong with this. Here we aren't trying to palm off an ersatz case on the reader. It is out in the open. We are telling an engaging tale in its own right. Whether it is the *Wizard of Oz* or Harry Potter, no one is fooled. Still there are lessons to be learned in any parable. We are Aesop on a mission, giving lessons of loyalty, persistence, pluck, friendship, and maybe even some science.

With cases of pure fantasy, no one will ever ask you the dreaded questions: "Is this a real story?" "What happened to the boy who was dying?" You will not have to guiltily answer, "Sorry, this isn't a real case." The student will not have to

leave disillusioned once more that the educational process isn't about the real world. It is just another classroom exercise. No need to invest any emotion here. Let's not do this to them once again. If it is fantasy, make it clean and obvious. They will enjoy it and remember it.

So, what is the bottom line on real vs. fictional cases? Both will work. But I argue: Students prefer the extremes, either real stories or complete fantasy. These are easiest to digest. The generic ones in the middle are less satisfying, "less filling." Unless such cases are written with skill, the students sense the deception. They care less. They work less. And, I believe, they learn less.