



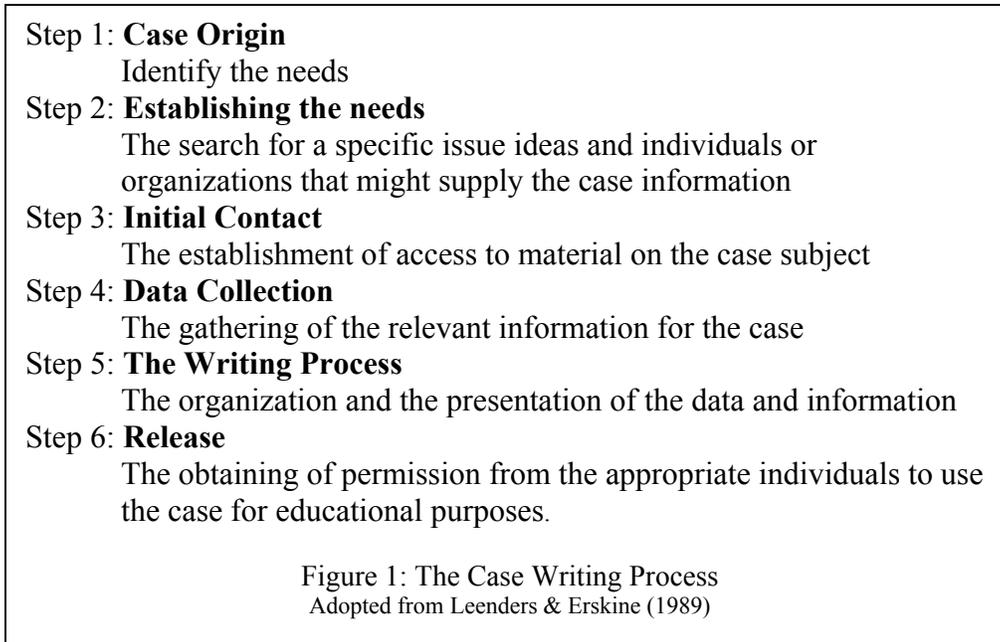
### Guidelines for Case Writing

Cases are effective instructional tools. Cases, like the telling of a story, reflect problem situations in real life and create an authentic learning environment for students. When students engage with cases, learning takes place: they analyze, synthesize and apply knowledge; they also perform evaluation, reasoning, and problem solving. The growing interest in using cases in instruction indicates a need for the development of new cases. However, opinions about what a good case should be like vary. The following is an integrated version of guidelines for case writing from three major sources (Abel, 1997; Kashani, 1995; Leenders & Erskine, 1989):

- **A case should appear authentic and realistic.** The case must develop the situation in real life terms. Reality must be brought into the case. Use as much factual information as possible. In the case, quotes, exhibits and pictures can be included to add realism and life to the case. The problem scenario in the case should be relevant to the real world so that students can experience and share the snapshot of reality.
- **Use an efficient and basic case structure in writing.** First, open up the case with the broadest questions, and then face the specific situation. Close with a full development of the specific issues. The presentation of a case should be primarily in a narrative style, which is a story-telling format that gives details about actions and persons involved in a problem situation.
- **There must be a fit of the case with students' educational needs, and the needs in practice.** The topics and content of the case should be appropriate and important to the particular students in which the case is used. Moreover, case ideas should be relevant to the learning objectives.
- **A case should not propound theories, but rather pose complex, controversial issues.** There are no simple or clearly bounded issues. The controversy of a case can entail debate or contest. It creates learning at many levels – not only substantive learning, but learning also with respect to communication and persuading others. The relationship between issues and the theories should be dealt with through the discussion or instruction.
- **There should be sufficient background information to allow students to tackle the issue(s).** Include not only the events that happened, but also how the people involved perceive them. There should be enough description in the prose of the case itself for students to be able to situate the case problem, understand the various issues that bear on the problem, and identify themselves with the decision-maker's position. Also, good cases need descriptions of the people involved since understanding an individual's predisposition, position, and values, is an important part of the decision making.
- **Write the case in a well-organized structure and in clear language.** A case should be easy to read or access. Make sure that you prepare an outline of the case and use it to organize your materials. Also ensure the clarity and refinement of your presentation of the case.

## Introduction to Case Writing

Case writing may be referred to the full process of case development from the decision to use a case to release of the case to its use in class. The entire sequence of steps of the process is set forth in Figure 1. However, the suggested activities for case writing that follow have been established to assist instructors or case writers in organizing and presenting information in the case format. The focus is on the writing process.



### Types of Cases

Before we take up the specific activities involved in the writing process, let's think about some fundamental questions, such as what a case is and what the educational functions in the use of cases are. Usually cases describe particular situations in which people are engaged in complex issues and are forced to take actions in a dilemma. Cases are often used in problem-based learning, in which students are placed in a problem situation and are encouraged to take the role of problem solvers. In this instance, cases are action provoking; cases are designed to present a problem that places students to be in the shoes of a relevant decision-maker in that particular situation for analysis and action recommendations.

In some occasions, cases are designed to provide different aspects that are related to the problem confronted. The cases are used as references. Often this type of case does not only describe a problem situation but also include the chosen solution and the outcome of the solution. Students review those cases and reason about how and why a solution succeeds or fails. Through this reasoning process, students obtain a deeper understanding of all the relevant factors in a particular problem situation.

### Values of Cases

Cases put students in an active learning mode. In other words, cases invite students to do things and to think about the things they are doing. In effect, cases present students with opportunities

to analyze and solve relevant real-world practical problems. Cases challenge students to test what they learn through practice instead of merely testing their memory.

Cases are thus useful in instruction that involves high-order thinking such as problem solving and interpretation. Moreover, cases promote transfer. With their active learning and their engagement in solving problems in the studies of the cases, students are better able to apply what they learn to a similar problem situation in the real world.

### **Activities in the Writing Process**

Writing cases is a challenging task, but rewarding as well. It involves complex and reflective endeavors as well as a creative experience. A case writer has to analyze, evaluate, interpret, and synthesize information and ideas. In fact, writing cases enriches one's teaching as well as research. The writing process comprises four major activities: planning, organizing, drafting, and revising.

#### Planning

Planning is the establishment of a scheme that lays out the important actions and the essential elements in writing a case. In order to do that, a case writer needs to (1) identify the purpose of the case writing task, (2) identify the learners, and (3) decide what information should be put into a case. An effective way to carry out the process is to ask yourself questions for each action you take.

- (1) Identifying the purpose of the case writing task: In an educational setting, the function of the case is instructional. Therefore, the questions pertain to what the students are supposed to learn with the case and what context this particular case is used in your teaching.
  - What are the learning objectives for the case?  
Learning objectives specify what students are expected to know and what they are expected to be able to do, value, or feel at the completion of an instructional segment (Nitko, 1996). That is to say, you have to think about or list the learning issues you would like students to engage in while studying the case, and the learning outcomes that students should reach after completing work on the case. Eventually, the learning objectives help you determine the content of the case in terms of concepts, rules and principles needed in studying the case.
  - How is the case used in terms of the instructional sequence?  
A case can be incorporated into the curriculum in different ways. It can be presented at the beginning of the instruction to elicit students' attention. The problem scenario presented in the case functions as a stimulus to motivate students to engage learning. A case can also act as an anchor that supports the learning of the content or skills of the subject. For example, some New Pathway courses in Harvard Medical School plan cases and other exercises around a weekly theme that integrates bioscience and clinical learning issues.

The instructor can ask students to read and analyze the case before coming to class. Then in class, lectures and discussions can revolve the concepts, rules and principles that are embedded in the problem situation. Another way is to present the case in class and to employ a role-play activity to involve students in the problem solving process.

A case can be used as an example that illustrates the ideas that have been taught in class or as another instance that represents different aspects of the problem situation that students encounter in the case studies. For example, in business course, the instructor can give a series of cases that deal with a common theme about management but display different situations, strategies and behaviors from different perspectives, such as a company owner, general manager or employees. These cases are useful for adding breadth and depth to the instruction.

The instructor also can use the case to assess students' learning. After a period of study, students are given a case and are asked to write answers to questions about the case.

In general, cases may be coordinated with lectures and other class activities; or it may stand-alone. By examining how you want the case to support your teaching and your students' learning, you are able to decide what your case should do and how you should write your case.

(2) Identifying the learners: Like any kind of writing, if you want your readers to understand the information and ideas you are trying to convey, you have to search for the common ground you and your readers share, and exploit this common ground in your writing. In this instance, the readers are the students.

- How much do students know about the subject?  
An effective case should make students interested in and motivate them to acquire a deeper understanding of the concepts and rules that have been taught or are going to be learned. Awareness of the level of entry skills of students is helpful to determine what learning issues should be pursued in the case and to detect the differences between the learning objectives and the prior knowledge of students have in the subject matter. The differences help to decide what information is necessary to be put in the case and what other teaching materials should be supplemented to the case so that students can empower themselves as problem solvers. Also the academic background of students helps to determine the tone of the case. Word-choice and the extent of explanatory detail contribute to the quality and character of this tone.
- What are the functions of students in the case study?  
Usually students in a case study implicitly assume the roles of the decision-makers in the case. A case developed for role-playing is presented somewhat differently from the one designed to provoke discussions among students. Both have rich descriptions of the problem issues in the case and enable the discovery of concepts, principles or rules to be learned. Basically, a case involving role-playing may require the case writer to embed more detailed information essential for the students, such as the positions and the perceptions of the people involved, to make inferences for their decision-making. Sometimes, the case writer also needs to provide other external resources for students to search for the information in order to work out the issue or problem they confront in the case. On the other hand, a case for discussion may present straightforward and comprehensive information about the context in which the problem arises, the chosen solution and its consequences.

(3) Deciding what information should be put into the case: The question of how to obtain the information should be considered early in your planning because the availability of

information surely influences your choice and quality of content. Moreover, the components of a case also determine what information is needed.

- Where is the source of the materials?  
Every writing task requires research. After you identify the case issues, you have to start looking for materials that make the case real and actual. The materials may come from different sources. You might draw the case materials from the reflections on your own personal experience, from stories that you have heard from friends or colleagues, or from articles and publications. The materials also can be obtained from interviews with experts on the subject matter that you are dealing with, or with the personnel in a particular organization that you are interested in and that is related to your case issues.
- What makes a case?  
An effective case gives students a learning experience to engage real-world problem(s). Therefore, the major element of the case resides in the authenticity of the context where the problem is situated and the problem itself. From this standpoint, a case should at least consist of a description of the setting (time and place), the characters (personality and responsibility), and a sequence of events that are present in the problem or decision-making situation. There should be information available and true enough in the case that will help students to become involved in this learning experience. For example, a clinical case for medical students usually has to do with a patient's health problem. To enrich the reality in the case, there should be relevant materials, such as records of physical examinations (X-rays and scans), and the dialogues between the patient and the doctor.

### Organizing

Organizing is the arrangement of ideas that support the purpose of the case. In this part of the case-writing process, you tackle the problem of how to present case materials. The major concerns here are the narrative structure and the presentation of the nature of the complexity of the issues in the case. Typically, cases are presented in a narrative format, which is desirable because of the belief that a story provokes the reader to actively engage the information. Also, cases are primarily problem based in nature. Cases are mostly governed by a problem scenario, which is more open-ended and controversial, and therefore brings out diverse opinions and multiple solutions.

(1) Structuring in a narrative style: Cases, owing to their resemblance to lifelike stories, are richer than plain presentations of concepts, rules and principles to be learned. Students are motivated more to get involved into the situation. Cases, situated in a problem context, are also more easily for students to recall and thus transfer to a new problem situation. All these make the use of case effective in instruction.

- What does a narrative consist of?  
A narrative is a story of an event. It includes what happened, who was involved, when it happened, why it happened, and how it happened. A case structured in a narrative style lays out a sequence of events, which develops the story. It brings the characters and actions before the eyes, and often, with dialogue, before the ears of students. Therefore, in a narrative, you must have details of a specific setting, a list of actors with names and descriptions of personalities, a progressive disclosure of actions, and the problems or issues that evolve the case.
- How is a narrative organized?

The usual way to organize a narrative is chronologically, in the order in which events occur. You may organize in order of importance, or start with the setting and time, or the actual event. Sometimes it can be more effective to start with the end of the action, or somewhere in the middle, and then tell the story through a series of flashbacks. No matter how you organize the case, the principle is to make the narrative structure clear by transition and keep students interested and focused on the points that you want to make.

(2) Presenting the nature of the complexity of case problem: Keep in mind that the information to be presented should justify the intention and the purpose of the writing task. An important objective in the use of cases in learning is to enhance students' ability in critical thinking and problem solving. In the case study, students are encouraged to analyze a problem from different perspectives. Beside the extensive analysis, students are also required to apply both values and judgments to reach a final solution or a consensus to a problem.

- How should the case reveal multifaceted phases of a problem?  
A plot should be implemented in the case. The plot should unfold around an interest- or conflict-arousing issue(s). The plot should provide uncertainty and then draw students into the particulars of the subject matter related to the case and the roles of the actors involved in the case. For example, a case dealing with the welfare policy may well raise controversy about the positive and negative impacts of a new welfare legislation.
- How does the case show different perspectives?  
A case writer should reveal the information in a way that the discussion of the case or the suggested solution for the case will draw students into contention of different interpretations, different judgments, different decisions and, consequently, different actions to take. The best way to enhance such effects is to display contrast and comparisons of different opinions by using direct quotations and dialogues.

### Drafting

Drafting is putting your ideas and thoughts down on the paper. The activity transforms ideas into concrete words and sentences; however, the focus of the activity lies in developing the ideas rather than on spelling, grammar, or paragraphing. When you start to write, you should know how the case is used in the instruction and what students are going to learn out of the case. In other words, you have to make sure your writing is congruent with the learning issues that organize the study of the case.

(1) Developing ideas

At this moment, an outline of the case is shaped. After the activities of planning and organizing the case, a case writer should have ideas about what to write about in the case and how to present those ideas in the case. Moreover, materials and information for developing the case should also be at hand. Drafting forces to further the ideas and digest the materials and information that have been gathered from the personal experience, the interviews, documents, or other sources.

- What is the central idea of the case?  
The central idea of the case emerges during the planning activity of the writing process. It is the controlling idea that provides the focus of the case. In fact, it derives from the learning objectives – what the students should know and do. The attention of the case should focus on learning issues that you want students to explore.

- How should the central idea of the case be supported?  
The case is a means of learning. It presents a description of a problem or decision situation where the learning issues are embedded. Thus, the development of the case evolves to support such a description in a way that can lead students to explore the learning issues and engage students in finding and solving problems. The principle is to give sufficient information to help students to situate themselves in the case. While you are writing, you will be deciding what students need to know to understand the case. For example, in the study of international policies, if you want to support a learning issue about establishing diplomatic relationship between two countries, you should consider presenting the facts, explanations and evidences about the current relationship between these two countries and why there is a need to establish the relationship. In the study of lighting design, you may want to give the descriptions of the size of the room, the function of the room, and how the electricity cords are laid out in the room. All of this information helps support the development of the case.

### Revising

Revising involves re-reading, evaluating, and making changes to improve the written case. While re-reading, you have to be an objective, critical reader. While evaluating, you need to know what to look for in your case, i.e., you have to identify major case components and judge them with a set of principles or criteria.

(1) Identifying and judging the writing elements in the case:

In this stage, a case writer needs to identify what in the case needs to be improved and how to improve the case.

- What are the major case components?  
The elements of the case to be scrutinized include the content of the case, which is evolved from the learning objectives, the problem-based scenario that sets forth the situation to motivate and engage students to learn, and a narrative structure in which ideas and problem issues are organized and presented.
- What are the criteria to evaluate the case?  
A case writer examines the appropriateness, unity and coherence of organization, and clarity of the presentation of the information in the case. Pay attention to the case elements and ask yourself the following questions to evaluate the case:
  - ⇒ Does the case achieve the learning objectives?
  - ⇒ Are the problem issue(s) presented in the case related to the learning objectives?
  - ⇒ Is the case sufficiently complete, complex and focused?
  - ⇒ Does a case present a situation, problem, or issue?
  - ⇒ Does the case appear to be realistic?
  - ⇒ Are all the constituents of a narrative included in the case, such as a storytelling style, the contextual descriptions of the situation, the portrays of the central characters, the development of a series of events, and an interesting plot evoking different perspectives?
  - ⇒ Are the events and actions in the case sequenced in a logical order?
  - ⇒ Are the events connected with appropriate transitional signals?

- ⇒ Is the content in the case accurate, relevant, and appropriate in terms of subject matter?
- ⇒ If there are external resources, are they appropriate?

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